# Tina's Compendium

Tax Preparation

### H&R Block TY2003 to TY2015 AARP TY2019 to TY2022

by Bettina von Schweinitz

#### Introduction

In Fall of 2003 I signed up for an H&R Block Tax Preparation course. I liked doing tax returns so much that I applied for a seasonal job. I was hired in December 2003.

I worked for H&R Block in Germantown Maryland from TY2003 to TY2008. Then moved to Texas and worked at Round Rock office from TY2008 to TY2010. Then moved back to Germantown Maryland for TY2011 to TY2013. Then moved back to Texas and worked for one year at Greenlawn office for TY2014 and in Premium Office for TY2015. Papa had died in August 2015, which was between tax seasons, so I was able to continue.

I was interested in doing tax preparation through AARP and was already in contact with the regional coordinator.

For TY2016 to TY2018 I did not prepare taxes because I was taking care of Mutti and her health was deteriorating. Mutti died in June 2019. In December 2019, I contacted the AARP coordinator and began the process of volunteering through AARP.

I volunteer at AARP in Pflugerville in TY2019 and TY2020. The TY2020 was cut short at Pflugerville so I transferred to the Round Rock location. Because of COVID restrictions I did not volunteer in TY2021. AARP was going completely on-line and I was not interested in this model. For TY2022 AARP returned to the in-person model and I returned to the Round Rock Location.

PTIN: Preparer Tax Identification Number: In TY2003 we had to have a PTIN assigned, mine is P00405019 Starting in TY2010 our PTIN number had to be renewed each year.

While working for H&R Block, the fee was paid by HRBLock.

After that I paid the fee.

EA: Enrolled Agent: In 2011 I passed the tests and became an Enrolled Agent at the IRS and my number is 00098514-EA. It must be renewed every three years with proof of sufficient Continued Education Credits. I renewed in 2014. I wanted to keep this certification in case I could find work with a Tax CPA. But when that expired in 2017, I did not renew. It was not required by AARP and I was no longer interested in working for a Tax CPA.

NY registration: Starting in TY2010, the state of New York required any paid Preparer that submits a NY return to be registered. While working in Maryland, I would prepare NY returns, so I was registered for TY2010 to TY2013. H&R Block TY2003 to TY2015

3



In November 2008 H&R Block paid for a professional photo done at Sears in Austin Texas.

Introduction 4

10/10/2023 H R Wages yearly 23/1010.xtsx 1

Tax		Hours	ı	# of paid			=#returns/ho		Fees	Additional		=Actual	%=Fees
year		worked	(fees)	returns	return	hour	ur	H&R#'s		Earns		•	earned/volum
2003	Germant	401.03										12.13	
2004	Germant	459.42	42277.14	251	168.43	92.02	0.5463		7703.16		8025.67	17.47	18.98%
2005	Germant	325.38	33017.00	183		101.47	0.5624		4792.25		6062.23	18.63	18.36%
2005	Safeway	80.58	4101.00	23	178.30	50.89			565.70		614.76	7.63	
2006	Germant	603.22	62807.00	327	192.07	104.12		4/30/2007	9059.69		11063.76	18.34	17.62%
2006	Safeway	50.00	1031.00	7	147.29				139.8		155.97	3.12	15.13%
2007	Germant	489.48	52179.00	255	204.62	106.60			7327.19			20.16	
2008	Texas	586.90	39050.45	210	185.95	66.54	0.3578		5741.49		8722.12	14.86	22.34%
2009	Texas	620.95	47391.00	222	213.47	76.32					9716.24	15.65	20.50%
2010	Germant	508.59	64564.65	309	208.95	126.95	0.6076	5/5/2011	8257.15	5283.64	13540.79	26.62	20.97%
2011	Germant	639.30	81059.07	377	215.01	126.79	0.5897	4/26/2012	10750.70	7254.49	18005.19	28.16	22.21%
2012	Germant	672.96	96196.84	432	222.68	142.95	0.6419	5/1/2013	13048.00	10127.77	23175.77	34.44	24.09%
2013	Germant	219.00	31561.00	120	263.01	144.11	0.5479	4/28/2014	4856.90	4195.25	9052.15	41.33	28.68%
2014	Germant	136.40	10748.35	40	268.71	78.80	0.2933	5/1/2015	1620.00	1483.20	3103.20	22.75	28.87%
2015	Greenlav	89.47	2929.25	15	195.28	32.74	0.1677	4/25/2016	389.00	662.88	1051.88	11.76	35.91%
Tax			=%POW	Actual Hrly	Total	OFFICE			2nd				
Year	OFFICE	POM Qty	return	RATE	Earned	BONUS	=TOTAL		Looks				
2003	Germant	25	13.51%	7.00	4865.90	0.00	4865.90		n/a				
2004	Germant	50	19.92%	9.70	8025.67	438.32	8463.99		n/a				
2005	Germant	32	17.49%	13.89	6062.23	444.67	6506.90		n/a				
2005	SAFEWA	1	4.35%	13.89	614.76	0.00	614.76		n/a				
2006	Germant	50	15.29%	14.90	11063.76	583.58	11647.34		0				
2006	SAFEWA	0	0.00%	14.90	155.97	0.00	155.97		0				
2007	Germant	45	17.65%	14.67	9866.27	411.78	10278.05		0				
2008	Texas	36	17.14%	14.69	8722.12	0.00			5				
2009	Texas	57	25.68%	15.65		0.00			7				
2010	Germant	44	14.24%	11.74	13540.79	0.00	13540.79		20	not converte	ed to amen	d/rtn	
2011	Germant	59		28.16		0.00				not converte			
2012	Germant	66	15,28%	34.44	23175.77	0.00	23175.77			not converte			
2013	Germant	33		41.33	9052.15	0.00							
2104	Germant	16		22.75		0.00							
2105	Greenlav	0	0.00%	11.76	1051.88					<del>                                     </del>			
2100	Ciccina		0.0076	11.70	1001.00	0.00	1001.00	<del>                                     </del>					
				<del>                                     </del>	<del>                                     </del>	<del>                                     </del>	129 000 25	Total Earned		<del>                                     </del>			
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This is a summary of my years with H&R Block.

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# H&R BLOCK TPCR TY2003 to TY2015

A great deal of the success of H&R Block is due to the ability and loyalty of its tax preparers - people like yourself, who capably staff the tax offices. Although not everyone qualifies for a commission, we are grateful to all tax preparers for providing expertise and services to our clients. 401.03 A. Hours: Regular 401.12 + Overtime 0.00 + Other 0.00 = Total Hours 401.12 B. Date first hired 12/01/2003 F. Total Returns 185 J. Baseline Retention 0.0000% C. Longevity % 0.0000% G. Total SA fees for ELF Returns \$0.00 K. Actual Retention 0.0000% D. Longevity Rate 0.0% H. Production Factor 0.46 J. Retention Percent Increase 0.0000% 100.0000% I. Dollar Volume/Hour E. Longevity Ratio \$70.16 M. Invalid Coupon Amount \$0.00 N. Code 004 \$0.00 27586+135 3772 O. Other Ineligible Codes \$195.00 Employee base volume \$28,339.00 Employee validated volume \$28,144.00 x 1a. \$25,048.16 1a. (89.0000%)Adjusted employee volume \$28,144.00 x 1b. 1b. \$25,048.16 (89.0000%)2. Basic Commission (19.0000% x line 1b) 2. \$4,759.15 3. Commission floor (\$3,000.00) \$3,000.00 Longevity volume(line 1b - line 4. \$22,048.16 Longevity Pay (line C x line 4) 5. 5. \$0.00 Other Volume: Express IRA (By Count) 1.00 \$5.50 Peace of Mind (By Volume) ♣ \$675.00 15.0000% \$101.25 25 Total: \$106.75 6. \$106.75 7. All State: \$0.00 Checking: 7. \$0.00 \$0.00 O.S. Meetings: \$0.00 Other: \$0.00 SA Fees Commission (line G x 19.0000%) 8. \$0.00 Total - Add lines 2, 5, 6, 7, 8 9. \$4,865.90 10. Office Coordinator Bonus 10. \$0.00 11. \*Additional compensations or adjustments not yet paid and not on lines 7 or 10. \$0.00 12. Total - Add lines 9, 10, and 11. 12. \$4,865.90 13. Total - All hours worked(from A, above) 13. 401.12 9,70 = 80% 14. Actual hourly rate (line 12 / line 13). 14. \$12.13 15. Overtime hours (from Payroll) 15. 16. Overtime pay (1/2 line 14 x line 15) \$0.00 16. 17. Total - Add lines 9 and 16. 17. \$4,865.90 18. \$2,807.92 280 7623 18. Total - All wages Paid (Payroll) 19. Net pay due (line 17 - line 18) (if zero or negative, amount enter zero) 19. \$2,057.98 20. Office Coordinator Bonus (line 10). 20. \$0.00 21. Amount from line 11. 21. \$0.00 22. Total compensation due (add lines 19, 20, and 21) 22. \$2,057.98 \* Explain amount on line 11: Once again, a very sincere thank you for your efforts. If you are in the vicinity of our office, please drop by for a chat about taxes or just to say hello. Whatever the case, please keep in touch, especially before our Tax Training School or by next December.

Office: SHOPS AT TOWN CENTER

EA 0 # Tax Season

Employee #: 369280

Location Code: 19476

Date: 4/29/2004

District Name: 19208

Dear Bettina,

Best regards,

H&R BLOCK

Name: Vonschweinitz, Bettina



May 7, 2004

#### Dear Associate,

At the beginning of TS04, phase one of a new pricing strategy was implemented in which client fees are based solely on the complexity of returns and forms used and are not linked to the electronic filing services required for bank products. Therefore, SA Fees were eliminated in certain states which required an adjustment to the national compensation plan for tax professionals in these areas.

The Blended Rate Formula was developed to ensure that Tax Pros earn the same compensation they would have earned had the SA Fees not been eliminated. Last fall, you were provided with individualized information regarding the Blended Rate, including examples of how this calculation will work for you. The example below is provided to illustrate and clarify the blended rate calculation.

Regards,

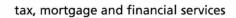
#### District Manager

			Bonus Lett	er Example		
	District Name: Liberty	у	Office Miller Square		Location Code: 123456	
	Name: Ima Taxpro		Employee #: 654123		Date: 04/28/204	
	Hours: Regular 300.00	0 + Overtime (	0.00 + Other 0.00 = Total Hours	s 300.00		
	B Date first hired	01/01/1998	F. Total Returns	150	J. Baseline Retention	72.40%
	C. Longevity %	5.3559%	G. Total SA fees for ELF Ret	turns \$0.00	K. Actual Retention	76.90%
•	D. Longevity Rate	6%	H. Production Factor	.50	L. Retention Percent Increase	4.50%
•	E. Longevity Ratio	89.2642%	I. Dollar Volume/Hour	\$73.33	M. Invalid Coupon Amount	\$0.00
					N. Code 004	\$0.00
					O. Other Ineligible Codes	\$0.00
	1. Employee Base Vo	olume \$22.000	0.00		•	
	la. Employee validate			. \$19,580.00		
			000.00 x (91.6779%)		b. \$20,169.14	100
	2. Basic Commission				2. \$3,976.14	
	3. Commission Floor			3		
	4. Longevity volume		e3)	4		
	5. Longevity Pay (lin				5. \$919.56	
			\	<b>X</b>	\ \	
	Longovi	tr 9/ Tine (		_	diusted Associate Volume Percent	_Line 1h
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#### Pilot Plan Earnings Calculation Overview

To aid in reviewing the enclosed pilot plan earnings calculation(s), please review the following overview. You may also want to refer back to the laminated worksheet provided to you last fall.

- 1. Lines A-AE recap your individual performance for the tax season. All of this information is used to calculate your overall earnings and include the following sections:
  - o Hours/hourly rate
  - o Volume
  - o Other wages
  - o Plan elements
  - Other items
  - o Number of paid returns
- 2. In the Earnings Calculation and Total Earnings sections:
  - o Lines 1-7 calculate your earnings based on the elements of the plan:
    - Tax preparation volume (plus other volume)
    - Prior related experience (PRE)
    - Certification
    - Client retention
    - POM sales
    - xIRA sales
  - o Line 8 incorporates your training wages.
  - Lines 13-15 determine your overtime recalculation.
  - Lines 21-23 display the calculated amounts due under the pilot plan, and if applicable, under the national plan including the 3% compensation guarantee, along with the resulting amount due.
  - Lines 24-26 compare your total earnings under the national plan including the 3% compensation guarantee to your pilot plan earnings and displays the resulting compensation guarantee amount, if applicable.
- 3. If you are eligible to receive a payout under the Compensation Guarantee, then you will also receive an additional bonus letter (similar to the National Plan letter) which explains how your actual bonus was calculated.
  - Line 1 displays your TS05 volume recalculated as it would have been in TS04.
  - o Lines 1a. 6 determine your tax preparation earnings under the TS04 blended rate plan using your TS05 blended rate, longevity rate, and base volume percent.
  - Line 7 illustrates the amount of the 3% increase in earnings based on the amount on Line 6.
  - Lines 8 25 display the remaining bonus calculations under the TS05 national plan.





TPC10 TY 2004 T\$ 2005

May 6, 2005

Dear Associate,

Tax Season 2005 - our 50th season serving clients - will be remembered more than just simply an important anniversary year, but a year that we successfully implemented a number of key initiatives designed to put us in a position to win today and tomorrow.

One of those key initiatives is so critical to our long-term success was this year's expansion of our Tax Professional compensation pilot program. I want to thank you for your participation as we successfully expanded the pilot this year from 10 districts to 70 districts. After all, keeping our associates satisfied is just as important as keeping our clients satisfied. Your participation in the pilot program will ultimately allow us to create a compensation package that fairly rewards tax professionals like you for your hard work and contribution!.

Enclosed you will find several important items that apply to the pilot program:

- Pilot Plan Earnings Calculation Overview
- Pilot Plan Earnings Calculation Letter
- National Plan Earnings Calculation Letter (if applicable)

As you recall, the pilot plan included a "compensation guarantee." This good-faith guarantee was added as a token of our appreciation to you for your participation, and to show our strong commitment to fairness. The guarantee ensures returning tax professionals participating in the pilot will earn the greater of their pilot plan earnings or 3 percent more than they would have earned in the TS04 blended rate plan for their TS05 performance. Therefore, we have provided you with calculations under both plans. Please note: First year and former major franchise associates will receive only a pilot plan calculation. Please refer to the Pilot Plan Earnings Calculation Overview as you review your pilot plan earnings calculation.

#### **Bonus Compensation**

Beginning this year, those eligible for bonus compensation will receive the amount either through direct deposit or U.S. Mail. Please review the compensation information provided to assure that it is complete and accurate. If you have any questions or concerns, please contact the district bookkeeper at your earliest opportunity. We would appreciate hearing your concerns and questions by June 1, 2005, so that we may promptly resolve any issues.

In addition to this bonus, you may be eligible to receive a Team Performance Plan bonus. Awards from the Team Performance Plan will be paid during the last half of May.

Thank you again for your willingness to participate in this critical pilot program. Your invaluable participation and feedback will help us deliver a compensation plan that is the industry's best. We hope to communicate future decisions about the pilot programs by late summer.

Best regards, Ralph Bartles, Jr. District Manager Montgomery County

16507 S Frederick Ave. Gaithersburg, MD 20877 Tel 240-631-0016 Fax 240 631-0019 <u>hrblock.com</u> strict Name: MONTGOMERY COUNTY, MD.

Office: SHOPS AT TOWN CENTER

Employee #: 369280

Location Code: 19476

Date: 05/02/2005

#### Dear Bettina,

Name: Vonschweinitz, Bettina

A great deal of the success of H&R Block is due to the ability and loyalty of its tax preparers - people like yourself, who capably staff the tax offices. Although not everyone qualifies for a commission, we are grateful to all tax preparers for providing expertise and services to our clients. 13+289 bank = 459.32 Pa w/

Servi	ces to our clients.	45000	Lund 280	450	I have 4	56.75+	2.87 Dan	- 45	39.36	
A. Ho	ours: Regular 434.5		+ Other 3.01 = Total Hours							
	ate first hired	12/01/2003 F. To			1 J. Basel	ine Retent	ion		64.3000%	
	ongevity Rate %	0.9523% G. SA	Fees / Express Filer Fees	\$100.0	0 K. Actua	I Retention	1		65.1690%	
	ears of Service %	1.0000% H. Pro	oduction Factor	0.5	5 L. Reter	ntion Perce	ent Increase	е	0.8690%	
	ongevity Ratio	95.2252% I. Do		\$92.0	2 M. Invali	d Coupon	Amount		\$0.00	
	,				N. Code	004			\$0.00	
					O. Other	Ineligible	Codes		\$365.00	
					P. IRS R	Rejects Und	collected F	ees	\$0.00	
Prod	luctivity Under TS0	4 National Plan								
1.	TS05 Volume							1.	\$42,642.14	
1a.		ed volume (\$42,277.						1a.	\$37,626.66	
1b.	Adjusted employe	e volume (\$42,277.1	4 x 89.0000%)					1b.	\$37,626.66	
2.	Basic Commission	1 (19.0000% x line 1	b)					2.	\$7,149.07	
3.	Commission floor	(\$3,000.00)						3.	\$3,000.00	
4.	Longevity volume	(line 1b - line 3)						4.	\$34,626.66	
5.	Longevity Pay (lin	e C x line 4)						5.	\$329.73	
6.	Total Tax Prepara	tion Commission - A	dd lines 2, 5					6.	\$7,478.80	
7.	3.0000% Guarante	ее						7.	\$224.36	
8.	Other Volume:									
	Express IRA (By 0	Count)		2	\$5.50		\$11.00			
	Peace of Mind (By	Volume)		\$1,350.00	15.0000%		\$202.50	/		
			Total:				\$213.50	8.	\$213.50	
9.	All State:		\$0.00 Ch	necking:		\$0.00		9.	\$90.01	
	O.S. Meetings:		\$0.00 Ot	her:		\$90.01				
10.	SA Fees / Express	s Filer Fees Commis	sion (line G x 19.0000%)					10.	\$19.00	20
11.	Total - Add lines 6							11.	\$8,025.67	,14
12.	Office Coordinator	Bonus						12.	\$0.00	
13.	*Additional compe	nsations or adjustme	ents not yet paid and not o	n lines 9 or 1	2.			13.	\$0.00	
14.	Total - Add lines 1							14.	\$8,025.67	
15.		orked (from A, above	e)					15.	459.42	
16.	Actual hourly rate		•					16.	\$17.47	
17.	Overtime hours (fr	•				2		17.	21.88	
18.	Overtime pay (1/2				10	3		18.	\$191.11	
19.	Total - Add lines 1				1			19.	\$8,216.78	
20.	Total - All wages F				4	514.28	-7	20.	\$4,513.11	
21.	_		or negative, amount entere	ed is zero)				21.	\$3,703.67	
22.	Office Coordinator			,				22.	\$0.00	
23.	Amount from line	, ,						23.	\$0.00	
24.		on due (add lines 21,	22, and 23)					24.	\$3,703.67	
_ 7.	. ota. osmponodic	200 (000 11100 21)	,						,,	

\* Explain amount on line 13:

\$8,216.78

Total Earned (Add lines 19, 22 and 23) 25.

25.

Once again, a very sincere thank you for your efforts. If you are in the vicinity of our office, please drop by for a chat about taxes or just to say hello. Whatever the case, please keep in touch, especially before our Tax Training School or by next December.

Best regards,

**H&R BLOCK** 

New Method

District Name: MONTGOMERY COUNTY, MD.

Name: Vonschweinitz, Bettina

Office: SHOPS AT TOWN CENTER

Employee #: 369280

Location Code: 19476

Date: 05/02/2005

Hours / Hourly Rates	s	Volume		Other \	Wages
A. Regular Hours	419.20	F. Tax Preparation	\$45,387.00	O. All State	\$0.00
B. Overtime Hours		G. SA Fees / Express Filer Fees	\$100.00	P. Checking	\$0.00
C. Training Hours	15.33	H. IRS Rejects Uncollected Fees	\$0.00	Q. Training	\$107.33
D. Other Hours	3.01	I. Invalid Coupons	\$0.00	R. OC Mtgs	\$0.00
E. PS Hourly Rate	\$9.70	J. Code 004	\$0.00	S. Other	\$90.01
	1	K. Other Ineligible Codes	\$365.00	T. Total	\$197.34
		L. Total Base Volume ((F+G)-H,I,J,K)	\$45,122.00		
		M. Total Return Volume (Line AD)	\$45,122.00		
		N. Total Other Volume (L-M)	\$0.00		
Plan Elements		Other Items			
U. PRE Rate	0.46 \$115.46	Z. Total Returns	251	249	
V. Certification Rate √ 251.00 @ \$	0.26 \$65.26	AA. Production Factor	0.55		
<b>W</b> . POM <b>v</b> 50 @ \$	4.50 \$225.00	AB. Dollar Volume/Hours	\$98.00		
X. xIRA 2 @ \$	5.50 \$11.00 <sup>J</sup>				
Y. Returning Clients J121 @ \$	4.60 \$556.60				

eturns	and E		lers			
Count /		Rate Per	Total			
Vo	lume	Return	Earned			
	0.00	\$1.29	\$0.00			
3	7.00	\$3.86	\$27.02			
3	4.00	\$7.73	\$30.92			
29	32.00	\$10.82	\$346.24			
26	26.00	\$17.38	\$451.88			
47 V	41.00	\$21.24	\$870.84			
36	39.00	\$25.11	\$979.29			
29	29.00	\$28.97	\$840.13			
42	43.00	\$34.76	1,494.68			
20	19.00	\$48.15	\$914.85			
8	7.00	\$66.95	\$468.65			
2	2.00	\$77.25	\$154.50			
,	1.00	\$109.44	\$109.44			
1	1.00	\$115.88	\$115.88			
	\$0.00	30.00%	\$0.00			
34	0.00					
25	51.00					
4531	0.00	\$	66,804.32 67 <sup>14</sup> .94			
	Vo 3 3 9 2 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Count / Volume 0.00 3 7.00 3 4.00 24 32.00 25 26.00 27 29.00 27 29.00 28 19.00 2 7.00 2 1.00 1 1.00 \$0.00	Volume 0.00 \$1.29 \$7.00 \$3.86 \$4.00 \$7.73 \$3.20 \$10.82 \$26.00 \$17.38 \$4.00 \$21.24 \$30.00 \$25.11 \$4.00 \$25.11 \$4.00 \$25.11 \$4.00 \$25.11 \$4.00 \$25.11 \$4.00 \$34.76 \$30.00 \$48.15 \$7.00 \$66.95 \$2.00 \$77.25 \$1.00 \$109.44 \$1.00 \$115.88 \$0.00 \$0.00 \$251.00 \$45,122.00 \$45,122.00			

Earnings Calculation	
1. Tax Preparation (Line AE)	774,94 \$6,804.32
2. Other Volume (Line N x 15.00%)	\$0.00
3. PRE (Line U)	\$115.46
4. Certification (Line V)	\$65.26
5. Client Retention (Line Y)	\$556.60
6. POM (Line W)	\$225.00
7. xIRA (Line X)	\$11.00
7. xIRA (Line X) 8. Other Wages (Line T) Training for ther	\$197.34
9. Total (Add Lines 1 - 8)	\$7,974.98
10. Office Coordinator Bonus	\$0.00
11. *Additional Compensation	\$0.00
12. Total (Add Lines 9,10 and 11)	\$7,974.98
13. Total Hours Worked 456.77	459.42
14. Actual Hourly Rate (Line 12/ Line 13)	\$17.36
15. Overtime Pay ((Line 14/2) x Line B)	\$189.91
16. Total Commission w/Overtime (Line 9 + Line	15) \$8,164.89
17. All Wages Paid (Payroll) 45 14.28	\$4,513.11
18. Net Pay Due (Line 16 - Line 17)	\$3,651.78
19. Office Coordinator Bonus (Line 10)	\$0.00
20. Additional Compensation (Line 11)	\$0.00
21. Total Due Pilot Plan (Add Lines 18, 19 and 20	\$3,651.78
22. Total Due National Plan (Incl. Comp. Guarant	ee) \$3,703.67
23. Final Due Amount	\$3,703.67

<sup>\*</sup> Explain amount on line 11:

Total Earnings	
24. Total National Plan Earnings including Compensation Guarantee	\$8,216.78
25. Total Pilot Plan Earnings (Add Lines 16, 19 and 20)	\$8,164.89
26. Compensation Guarantee Amount (Line 24 - Line 25) (if zero or negative, amount entered is zero)	\$51.90

2005 OLD DRAW

DATE '08APR2005

**FEES COLLECTED** 2ND YEAR SUBTRACTION 36,001.00 3,000.00

FEES FOR COMMISSION

33,001.00

POM QTY

41.00 @ \$4.05 PER

166.05

COMMISH = FEES \* 89% \* 19% + (4.05 \* POM QTY)

5,746.52

DRAW REGULAR \$9.7 RATE \* 380.24 HRS

3,688.33

DRAW OVERTIME \$14.55 RATE 9.26 HRS

134.73

**TOTAL DRAW** 

3,823.06

TOTAL COMPENSATION DUE (BEFORE CLIENT RETENTION) **COMMISSION - DRAW** 

1,923.46

CLIENT RETENTION \$4.60 PER RETURNING CLIENT

OFFICE BONUS

473.80 0.00

TOTAL COMPENSATION DUE

2,397.26

#### **NEW DRAW**

DATE 8APR2005 DRAW REGULAR	9.7 RATE X	380.24 HRS =	3688.328	
DRAW OVERTIME	14.55 RATE X	9.26 HRS =	134.733	
TOTAL DRAW				3,823.06
TAX PREPRATION F	ROM LOG		5489.79	
CERTIFICATION FLAT FEE	0.46 PER PAID RETURNS STA -RETURNS UNF -RETURNS ON +FRIENDS AND +PRIOR YEARS	RTED 2004: 216 RESOLVED: 11 HOLD 3 O MINE 1	209.46	
PRIOR EXPERIENCE FLAT FE	0.26 PER PAID RET	URN 209	54.34	
POMS	4.5 PER POM SOLI	D 41	184.5	
TOTAL COMMISSION BEFORE	CLIENT RETENTION			5,938.09
TOTAL COMPENSATION DUE ( COMMISSION - DRA		1)		2,115.03
CLIENT RETENTION OFFICE BONUS	4.6 PER RETURNIN	NG CLIENT 103	473.8 0	
TOTAL COMPENSATION DUE				2,588.83

M. Total Return Volume (Line AF)

N. Total Other Volume (L-M)

District Name: MONTGOMERY COUNTY, MD.

Hours / Hourly Rates

Name: Vonschweinitz, Bettina

Office: SHOPS AT TOWN CENTER

Employee #: 369280

Date: 06/02/2006

A. Regular Hours	13,84 x 315.10
B. Overtime Hours	0.00
C. Training Hours	7,5 × 10.28
D. Other Hours	0.00
E. PS Hourly Rate	\$13.89
	315.10 +10.28 325.38

5	Volume		O4h == 14/= ==	
1	F. Tax Preparation	\$33,704.00	Other Wage	25
-	G. Express Filer Fees	\$0.00	O. All State	\$0.00
			P. Click & Mortar	\$0.00
	H. IRS Rejects Uncollected Fees	\$0.00	Q. Training	\$77.13
)	I. Invalid Coupons	\$0.00	R. OL Mtgs	\$0.00
	<b>J</b> . Code 004	\$0.00	•	
	K. Other Ineligible Codes	\$687.00	S. Transition Plan	\$0.00
	L. Total Base Volume ((F+G)-	Ψ001.00	T. Other	\$0.00
	H,I,J,K)	\$33,017.00	U. Total	\$77.13

V. PRE Rate	183.00 @ \$87.84 \$0.48
<b>W</b> . Certification Rate	183.00 @ \$137.25 \$0.75
X. POM	32 @ \$4.50 \$144.00
Y. xIRA	0 @ \$5.50 \$0.00
Z. X Savings	0 @ \$5.50 \$0.00

AA. Returning

Clients

**Plan Elements** 

Other Items		18 -18 -96
AB. Total Returns	185	# 000
AC. Production Factor	0.46	-5 . M
AD. Dollar Volume/Hours	\$81.33	

\$33,017.00

\$0.00

AE. Number of Paid Returns and Express Filers					
Tax Prep Fees	Count /	Rate Per	Total		
Per Return	Volume	Return	<b>Earned</b>		
\$1.00 - \$29.00	0.00	\$1.33	\$0.00		
\$29.01 - \$57.00	2.00	\$3.98	\$7.96		
\$57.01 - \$85.00	13.00	\$7.97	\$103.61		
\$85.01 - \$114.00	18.00	\$11.15	\$200.70		
\$114.01 - \$141.00	23.00	\$17.91	\$411.93		
\$141.01 - \$170.00	36.00	\$21.88	\$787.68		
\$170.01 - \$197.00	25.00	\$25.87	\$646.75		
\$197.01 - \$226.00	28.00	\$29.84	\$835.52		
\$226.01 - \$282.00	22.00	\$35.81	\$787.82		
\$282.01 - \$339.00	7.00	\$49.60	\$347.20		
\$339.01 - \$395.00	5.00	\$68.96	\$344.80		
\$395.01 - \$451.00	4.00	\$79.57	\$318.28		
\$451.01 - \$507.00	0.00	\$112.73	\$0.00		
\$507.01 - \$564.00	0.00	\$119.36	\$0.00		
Volume Over \$564.00	0.00	\$0.30	\$0.00		
Returns Over \$564.00	0.00				
AE. Total Paid Returns and EF's	183.00				
AF. Total Volume	\$33,017.00				

174 @ \$4.74 \$824.76

Earnings Calculation		ı
1. Tax Preparation (Line AG)	\$4,792.25	ı
2. Other Volume (Line N x 15.00%)	\$0.00	ı
3. PRE (Line V)	\$87.84	ı
4. Certification (Line W)	\$137.25	ı
5. Client Retention (Line AA)	\$824.76	ı
6. POM (Line X)	\$144.00	ı
7. Express Products (Line Y + Line Z)	\$0.00	ı
8. Other Wages (Line U)	\$77.13	ı
9. Total (Add Lines 1 - 8)	\$6,063.23	ı
10. Office Coordinator/Team Lead Bonus	\$0.00	ı
11. *Additional Compensation \$0.00	\$0.00	ı
Alt Channel Earnings \$0.00	)	ı
12. Total (Add Lines 9,10 and 11)	\$6,063.23	l
13. Total Hours Worked 325.38 405.96	0	ł
<b>14.</b> Actual Hourly Rate (Line 12/ Line 13) \$14.94	18.63	l
15. Overtime Pay ((Line 14/2) x OT Hours)	\$0.00	l
<b>16.</b> Total Commission w/Overtime (Line 9 + Line 15)	\$6,063.23	l
<b>17.</b> All Wages Paid (Payroll)	\$4,453.88	ľ
<b>18.</b> Net Pay Due (Line 16 - Line 17)	\$1,609.35	l
19. Office Coordinator/Team Lead Bonus (Line 10)	\$0.00	l
20. Additional Compensation (Line 11)	\$0.00	ĺ
21. Total Due IP Plan (Add Lines 18, 19 and 20)	\$1,609.35	l
22. Total Due National Plan (Incl. Comp. Guarantee)	\$0.00	l
23. Final Due Amount	\$1,609.35	l
		ı

<ul> <li>Explain amount on I</li> </ul>	ine 11	:
---	--------	---

AG. Total Tax Preparation

\$4,792.25

\$7744 HISSINS \$7.5

6/2/2006

Total Earnings	
24. Total National Plan Earnings including Compensation Guarantee	\$0.00
25. Total IP Plan Earnings (Add Lines 16, 19 and 20)	\$6,063.23
26. Compensation Guarantee Amount (Line 24 - Line 25) (if zero or negative, amount entered is zero)	\$0.00

7/2005 TPCR

Employee #: 369280

Office: SHOPS AT TOWN CENTER

Borrus Channel: Alt Channel

Date: 06/02/2006

District Name: MONTGOMERY COUNTY, MD.

Name: Vonschweinitz, Bettina

Hours / Hourly Rates

A. Regular Hours	78.55	011			
_		Volume		Other Wage	es
B. Overtime Hours	0.00	F. Tax Preparation	\$4,151.00	O. All State	\$0.00
C. Training Hours	0.00	G. Express Filer Fees	\$0.00	P. Click & Mortar	\$0.00
D. Other Hours	2.03	H. IRS Rejects Uncollected Fees	\$0.00	Q. Training	\$0.00
E. PS Hourly Rate	\$13.89	I. Invalid Coupons	\$0.00	R. OL Mtgs	\$0.00
		J. Code 004	\$0.00	S. Transition Plan	\$0.00
		K. Other Ineligible Codes	\$50.00	T. Other	\$16.27
		L. Total Base Volume ((F+G)-H,I,J,K)	\$4,101.00	U. Total	\$16.27
		M. Total Return Volume (Line AF)	\$4,101.00		

N. Total Other Volume (L-M) \$0.00 Plan Elements

23.00 @ \$11.04 \$0.48 V. PRE Rate 23.00 @ \$17.25 \$0.75 W. Certification Rate X. POM 1@\$4.50 \$4.50 Y. xIRA 0 @ \$5.50 \$0.00 Z. X Savings 0 @ \$5.50 \$0.00 AA. Returning 0 @ \$4.74 \$0.00

Clients

	1
23	•
.29	5
.89	1
)	)

AE. Number of Paid Ref	turne and E	vnroce 5	ilore
AL. Number of Fald Re	urns and E		
Tax Prep Fees	Count /	Rate Per	Total
Per Return	Volume	Return	Earned
\$1.00 - \$29.00	0.00	\$1.33	\$0.00
\$29.01 - \$57.00	0.00	\$3.98	\$0.00
\$57.01 - \$85.00	1.00	\$7.97	\$7.97
\$85.01 - \$114.00	4.00	\$11.15	\$44.60
\$114.01 - \$141.00	2.00	\$17.91	\$35.82
\$141.01 - \$170.00	5.00	\$21.88	\$109.40
\$170.01 - \$197.00	1.00	\$25.87	\$25.87
\$197.01 - \$226.00	5.00	\$29.84	\$149.20
\$226.01 - \$282.00	4.00	\$35.81	\$143.24
\$282.01 - \$339.00	1.00	\$49.60	\$49.60
\$339.01 - \$395.00	0.00	\$68.96	\$0.00
\$395.01 - \$451.00	0.00	\$79.57	\$0.00
\$451.01 - \$507.00	0.00	\$112.73	\$0.00
\$507.01 - \$564.00	0.00	\$119.36	\$0.00
Volume Over \$564.00	0.00	\$0.30	\$0.00
Returns Over \$564.00	0.00		
<b>AE</b> . Total Paid Returns and EF's	23.00		
AF. Total Volume AG. Total Tax Preparation	\$4,101.00		\$565.70

Earnings Calculation		
1. Tax Preparation (Line AG)		\$565.70
2. Other Volume (Line N x 15.00%)		\$0.00
3. PRE (Line V)		\$11.04
4. Certification (Line W)		\$17.25
<ol><li>Client Retention (Line AA)</li></ol>		\$0.00
6. POM (Line X)		\$4.50
<ol><li>Express Products (Line Y + Line Z)</li></ol>		\$0.00
8. Other Wages (Line U)		\$16.27
9. Total (Add Lines 1 - 8)		\$614.76
<ol><li>Office Coordinator/Team Lead Bonus</li></ol>		\$0.00
11. *Additional Compensation		\$0.00
<b>12.</b> Total (Add Lines 9,10 and 11)		\$614.76
<ol><li>Total Hours Worked</li></ol>	80.58	-
14. Actual Hourly Rate (Line 12/ Line 13)	\$13.89	
15. Overtime Pay ((Line 14/2) x OT Hours)		\$0.00
16. Total Commission w/Overtime (Line 9 +	Line 15)	\$614.76
17. All Wages Paid (Payroll)		\$1,107.33
<b>18.</b> Net Pay Due (Line 16 - Line 17)		\$0.00
19. Office Coordinator/Team Lead Bonus (Li	ine 10)	\$0.00
20. Additional Compensation (Line 11)		\$0.00
21. Total Due IP Plan (Add Lines 18, 19 and	20)	\$0.00
22. Total Due National Plan (Incl. Comp. Gu	arantee)	\$0.00
23. Final Due Amount		\$0.00

<sup>\*</sup> Explain amount on line 11:

24. Total National Plan Earnings including Compensation Guarantee	\$0.00
25. Total IP Plan Earnings (Add Lines 16, 19 and 20)	\$614.76
26. Compensation Guarantee Amount (Line 24 - Line 25) (if zero or negative, amount entered is zero)	\$0.00





June 20, 2006

To Ralph From Tina

#### Dear Associate:

In reviewing the bonuses for tax professionals for the 2006 tax season, we discovered a system issue in which approved balance due volume was not included in tax professional compensation volume, resulting in an understatement of tax pro volume. Fortunately, this incident impacted a very small percentage of our tax professionals.

As a result, your tax professional compensation for TS06 has been adjusted. Enclosed is the tax professional compensation report representing the correct calculation. You will receive a check for the difference between your original bonus payout and the bonus payout based on the enclosed report. The additional bonus check will be mailed on June 23 with a pay date of June 26. Direct deposit funds will be available June 26 and advices will be available online through H&R Block Self Service on June 26.

We are pleased to award you this additional compensation for your hard work and client focus this past tax season. Please accept our apology for the error in the calculation of your bonus.

Thank you again for commitment to H&R Block and to your clients. If you have any questions and or concerns, please contact your District Manager or the AC/DAC.

Best Regards,

Sarah McElwee Vice President of Tax Professional Experience



tax, mortgage and financial services

TPCR'S

TY 2006

May 4, 2007

Dear Tax Associate,

When we set out this tax season to transform the industry, we did so knowing our chances for success were strong. Why so confident? We have the best tax professionals in the industry!

Thanks to your efforts, we did experience success in many areas, including: Opening nearly one-half of our offices in November to offer the IMAL; launching the H&R Block Prepaid Emerald Card, opening all remaining offices on January 2, and kicking off the second National Tax Advice Day to bring attention to your expertise. But the most important successes were accomplished locally at the tax desk as you helped your clients achieve their financial goals. On behalf of your district, senior leadership and your clients, we thank you for your many contributions.

Attached you will find your Individual Performance Plan Compensation Report that provides you with detailed information about your total compensation earned during your contract period. It includes the amount of compensation previously paid and the final amount due, if applicable. We have expanded our support options for you this year to ensure that we give you all the timely and appropriate feedback to any questions you might have as it relates to your compensation this year. If you have general questions about the report, including how to read the report or how any of the fields are calculated, please contact the service center at 1-877-266-7019. This is a special number just for your use. If you have questions about your actual payout or physical check, please contact me, your District Manager directly.

We hope that you consider Block again next year, and choose to stay in touch with us over the spring and summer months. Plans are already underway to take this year's learnings and build upon them for next year's success. Topping the list is continued investment in you, our foundation.

Thank you again for your many contributions in TS07.

Sincerely,

Ralph Bartles, Jr District Manager H&R Block, Inc. District Name: 19208 - MONTGO ERY COUNTY, MD.

Name: Vonschweinitz, Bettina

Tax Professional Compensation Report Office: 19433 - WALNUT HILL SHOPPING

CENTER Employee #: 369280 Germantown

Date: 04/30/2007

Hours / H	Hourly Rates	Volume			Other Wag	ges	
A. Regular Hours		F. Net Tax Preparation Volume	62,195	\$62,807.00	K. All State	\$0.00	
B. Overtime Hours	605.22 582.30 L 69.40	<b>∕G</b> . Express Filer Fees		\$0.00	L. Click & Mortar	\$0.00	
C. Training Hours	603.0 17.81	∕H. Total Base Volume (F+G)		\$62,807.00	M. Training	\$133.64	/
D. Other Hours	3.11	<ol> <li>Total Return Volume (Line AF)</li> </ol>		\$62,807.00	N. OL Mtgs	\$0.00	
E. PS Hourly Rate	\$14.90	J. Total Other Volume (H-I)		\$0.00	O. Transition Plan	\$0.00	
					P. Other	\$180.90	
					Q. Total	\$314.54	

Business Focus Areas		Plan	Elements			Other Items			
	<b>R</b> . POM 50	50 @ \$4.50 \$225.00	X. Returned Clients	143 144 @ \$4.89	\$704.16	AB.	Total Returns	330	
	S. Second Look Review	0 @ \$10.00 \$0.00	Y. PRE Rate	√ 327.00 @ \$0.78	\$255.06	AC.	Production Factor	0.55	
	T. Second Look Certification	0 @ \$3.00 \$0.00	Z. Certification Rate	✓ 327.00 @ \$1.53	\$500.31	AD.	Dollar Volume/Hours	\$104.12	
	<b>U</b> . 1040 EZT	0 @ \$1.50 \$0.00	AA. Total Plan Elements		\$1,459.53				
	V. Family & Friends Billed	1 @ \$5.00 \$5.00	4 6 6						
	W Total Rusiness Focus	\$230.00							

AE. Number of Paid Returns and Express Filers					
Tax Prep Fees	Count /	Rate Per	Total		
Per Return	Volume	Return	Earned		
\$1.00 - \$30.00	6 2.00	\$1.37	\$2.74		
\$30.01 - \$60.00	9.00	\$4.10	\$36.90		
\$60.01 - \$89.00	38 38.00	\$8.18	\$310.84		
\$89.01 - \$119.00	23 22.00	\$11.49	\$252.78		
\$119.01 - \$147.00	35 33.00	\$18.45	\$608.85		
\$147.01 - \$178.00	49 49.00	\$22.54	\$1,104.46		
\$178.01 - \$206.00	43 43.00	\$26.65	\$1,145.95		
\$206.01 - \$236.00	39 40.00	\$30.74	\$1,229.60		
\$236.01 - \$295.00	54 54.00	\$36.89	\$1,992.06		
\$295.01 - \$354.00	18 20.00	\$51.09	\$1,021.80		
\$354.01 - \$413.00	13 13.00	\$71.03	\$923.39		
\$413.01 - \$471.00	, 1.00	\$81.96	\$81.96		
\$471.01 - \$530.00	3 3.00	\$116.12	\$348.36		
\$530.01 - \$590.00	0.00	\$122.95	\$0.00		
Volume Over \$590.00	0.00	30.00%	\$0.00		
Returns Over \$590.00	0.00		44.		
AE. Total Paid Returns and EF's	327.00	Based o	n 4/18/07		
AF. Total Volume	\$62,807.00		14,4%		
AG. Total Tax Preparation	62,195.00		\$9,059.69		
	,		8953.44		

Earnings Calculate	tion	
1. Tax Preparation (Line AG)	8953,44	\$9,059.69
2. Other Volume (Line J x 15.00%)		\$0.00
3. Total Business Focus (Line W)	225	\$230.00
4. Total Plan Elements (Line AA)		<b>✓</b> \$1,459.53
5. Other Wages (Line Q)		\$314.54
6. Total (Add Lines 1 - 5)		\$11,063.76
7. Office Coordinator Bonus		\$0.00
<ol><li>*Additional Compensation</li></ol>		\$0.00
9. Total (Add Lines 6,7 and 8)		\$11,063.76
10. Total Hours Worked <b>ქ</b> (A₊, €)	603.22	
11. Actual Hourly Rate (Line 9/ Line 10)	√ \$18.34	
12. Overtime Pay ((Line 11/2) x OT Hours)	B x 18,31 = 636.40	\$636.44
13. Total w/Overtime (Line 6 + Line 12)	2	\$11,700.20
14. All Wages Paid (Payroll)		\$9,060.08
15. Net Pay Due (Line 13 - Line 14)		\$2,640.12
<ol><li>Office Coordinator Bonus (Line 7)</li></ol>		\$0.00
<ol><li>Total Additional Compensation</li></ol>		\$0.00
*Additional Compensation (Line 8)	\$0.00	
ALT Earnings	\$0.00	
REE Earnings	0	
18. Total Due IP Plan (Add Lines 15, 16 and		\$2,640.12
19. Total Due National Plan (Incl. Comp. Gu	arantee)	\$0.00
20. Final Due Amount		\$2,640.12

\* Explain amount on line 8:

Next year Hourh Rate 14,67

Total Earnings	
21. Total National Plan Earnings including Compensation Guarantee	\$0.00
22. Total IP Plan Earnings (Add Lines 13, 16 and 17)	\$11,700.20
23. Compensation Guarantee Amount (Line 21 - Line 22) (if zero or negative, amount entered is zero)	\$0.00

5173 5173 5173	5.43 5.75 6.63 17.81	Jos/06 12/08/06 12/08/06 12/22/06	= 40.75 = 43.13 +9.76 133.64
	1100		

5001 Reg 48.85 642.87 1/19/07 2/16 5001 over 2/16 400.07 17,90 3/09 61.09 2.73 11.18 3/30 ,50 4/13 116.59 5,22 4/25 626.92 28.05

5009 9158 142.05 2/16

5171 Reg 1.33 hrs \$ 10.67 3/30 1.78 14.27 4/25 3.11 hrs 15.00 5171 180.00 4/25 19.40 Total overtime has \$ 1395.85 District Name: 19208 - MONTGC /IERY

COUNTY, MD.

Name: Vonschweinitz, Bettina

Tax Professional Compensation Report Office: 19433 - WALNUT HILL SHOPPING

CENTER

Employee #: 369280

Satoway

Bonus Channel: ALT Date: 04/30/2007

Hours / Hourly Rates		Volume		Other Wages	S
A. Regular Hours	50.00	F. Net Tax Preparation Volume	\$1,031.00	K. All State	\$0.00
B. Overtime Hours	0.00	G. Express Filer Fees	\$0.00	L. Click & Mortar	\$0.00
C. Training Hours	0.00	H. Total Base Volume (F+G)	\$1,031.00	M. Training	\$0.00
D. Other Hours	0.00	I. Total Return Volume (Line AF)	\$1,031.00	N. OL Mtgs	\$0.00
E. PS Hourly Rate	\$14.90	J. Total Other Volume (H-I)	\$0.00	O. Transition Plan	\$0.00
				P. Other	\$0.00
				Q. Total	\$0.00

Business Focus Areas		Plan Elements		Other Items				
R. POM	0 @ \$4.50	\$0.00	X. Returned Clients	0 @ \$4.89	\$0.00	AB	Total Returns	7
S. Second Look Review	0 @ \$10.00	\$0.00	Y. PRE Rate	7.00 @ \$0.78	\$5.46	AC.	Production Factor	0.14
T. Second Look Certification	0 @ \$3.00	\$0.00	Z. Certification Rate	7.00 @ \$1.53	\$10.71	AD	Dollar Volume/Hours	\$20.62
<b>U</b> . 1040 EZT	0 @ \$1.50	\$0.00	AA. Total Plan Elements		\$16.17			
V. Family & Friends Billed	0 @ \$5.00	\$0.00						
W Total Business Focus		\$0.00						

AE. Number of Paid Returns and Express Filers							
Tax Prep Fees	Count /	Rate Per	Total				
Per Return	Volume	Return	<b>Earned</b>				
\$1.00 - \$30.00	0.00	\$1.37	\$0.00				
\$30.01 - \$60.00	0.00	\$4.10	\$0.00				
\$60.01 - \$89.00	1.00	\$8.18	\$8.18				
\$89.01 - \$119.00	2.00	\$11.49	\$22.98				
\$119.01 - \$147.00	1.00	\$18.45	\$18.45				
\$147.01 - \$178.00	0.00	\$22.54	\$0.00				
\$178.01 - \$206.00	2.00	\$26.65	\$53.30				
\$206.01 - \$236.00	0.00	\$30.74	\$0.00				
\$236.01 - \$295.00	1.00	\$36.89	\$36.89				
\$295.01 - \$354.00	0.00	\$51.09	\$0.00				
\$354.01 - \$413.00	0.00	\$71.03	\$0.00				
\$413.01 - \$471.00	0.00	\$81.96	\$0.00				
\$471.01 - \$530.00	0.00	\$116.12	\$0.00				
\$530.01 - \$590.00	0.00	\$122.95	\$0.00				
Volume Over \$590.00	0.00	30.00%	\$0.00				
Returns Over \$590.00	0.00						
AE. Total Paid Returns and EF's	7.00						
AF. Total Volume	\$1,031.00						
AG. Total Tax Preparation			\$139.80				

Earnings Calculation		
1. Tax Preparation (Line AG)		\$139.80
2. Other Volume (Line J x 15.00%)		\$0.00
<ol><li>Total Business Focus (Line W)</li></ol>		\$0.00
4. Total Plan Elements (Line AA)		\$16.17
5. Other Wages (Line Q)		\$0.00
6. Total (Add Lines 1 - 5)		\$155.97
7. Office Coordinator Bonus		\$0.00
8. *Additional Compensation		\$0.00
9. Total (Add Lines 6,7 and 8)		\$155.97
10. Total Hours Worked	50.00	
11. Actual Hourly Rate (Line 9/ Line 10)	\$14.90	
12. Overtime Pay ((Line 11/2) x OT Hours)		\$0.00
13. Total w/Overtime (Line 6 + Line 12)		\$155.97
14. All Wages Paid (Payroll)		\$677.62
15. Net Pay Due (Line 13 - Line 14)		\$0.00
<ol><li>Office Coordinator Bonus (Line 7)</li></ol>		\$0.00
17. Total Additional Compensation		\$0.00
*Additional Compensation (Line 8)	\$0.00	
18. Total Due IP Plan (Add Lines 15, 16 and 17)		\$0.00
19. Total Due National Plan (Incl. Comp. Guarantee)		\$0.00
20. Final Due Amount		\$0.00

<sup>\*</sup> Explain amount on line 8:

Total Earnings	
21. Total National Plan Earnings including Compensation Guarantee	\$0.00
22. Total IP Plan Earnings (Add Lines 13, 16 and 17)	\$155.97
23. Compensation Guarantee Amount (Line 21 - Line 23) (if zero or negative, amount entered is zero)	\$0.00

#### Main DRAW

2007 MAIN DATE 15APR2007 DRAW REGULAR old 13.16 RATE X 57.98 HRS = 763.0168 corrected DRAW REGULAR 14.9 RATE X 489.70 HRS = 7296.53 547.68 =HRS TOTAL DRAW 8,059.55 FROM LOG: My Commission on Returns TAX PREPRATION 8526.95 CERTIFICATION FLAT FEE 1.53 PER PAID RETURN 313 478.89 RETURNS STARTED 2006 327 -RETURNS UNRESOLVED 14 -RETURNS ON HOLD/FRIE 0 +AMENDS 2006 2 +OTHER 1 PRIOR EXPERIENCE FLAT F 0.78 PER PAID RETURN 313 244.14 POMS 4.5 PER POM SOLD 47 211.5 5.5 PER xIRA SOLD 0 TOTAL COMMISSION BEFORE CLIENT RETENTION 9,461.48 TOTAL COMPENSATION DUE (BEFORE CLIENT RETENTION) 1,401.93 COMMISSION - DRAW CLIENT RETENTION 4.89 PER RETURNING CLIENT 138 674.82 OFFICE BONUS TOTAL COMPENSATION DUE 2,076.75 TOTAL PAY EXPECTED 10,136.30 MAIN OFFICE ONLY

	2006 YEAR	2005 YEAR	2004 YEAR	2003 YEAR
VOLUME =	61,280.00	33,704.00	42,642.14	28,339.00
VOLUME	59,123.00			
H&R COUPONS	2,157.00			
HRS=	547.68	325.38	459.42	401
RTNS=	313	183	251	185
SVOLUME PER RETURN = VOLUME/PAID R	195.78	184.17	169.89	153.18
\$VOLUME PER HOUR = VOLUME/HOURS	111.89	103.58	92.82	70.67
RETURNS PER HOUR = RETURNS/HOURS	0.57150161	0.5624193	0.546341	0.4613466
TOTAL PAY EXPECTED (RECEIVED)	10,136.30	7.538.10	8.731.41	4.865.90
TOTAL FAT EATED (NEOFIVED)	10,100.00	7,000.10	0,731.41	4,000.

6
5
37
22
33
48
41
38
51
15
13
1
3
0
0
0

313 RETURNS paid and hold

District Name: 19208 - MONTGOMERY

COUNTY, MD.

Name: Vonschweinitz, Bettina

Employee #: 369280

Tax Professional Compensation Report
Office: 19476 - SHOPS AT TOWN CENTER

Date: 05/02/2008

Hours / Hourly Rates		Volume		Other Wages	
A. Regular Hours	460.21	G. Net Tax Preparation Volume	\$52,079.00	L. All State	\$0.00
B. Overtime Hours	11.75	H. Express Filer Fees	\$100.00	M. Click & Mortar	\$0.00
C. Doubletime Hours	0.00	I. Total Base Volume (G+H)	\$52,179.00	N. Training	\$116.01
D. Training Hours	15.47	J. Total Return Volume (Line AG)	\$52,179.00	O. OL Mtgs	\$0.00
E. Other Hours	2.05	K. Total Other Volume (I-J)	\$0.00	P. Transition Plan	\$0.00
F. PS Hourly Rate	\$14.67			Q. Other	\$16.23
				R. Total	\$132.24

Business Focus Areas		Plan Elements			Other Items		
S. POM	45 @ \$4.50	\$202.50	Y. Returned Clients	241 @ \$4.99	\$1,202.59	AC. Total Returns	258
T. Second Look Review	0 @ \$10.00	\$0.00	Z. PRE Rate	255.00 @ \$1.11	\$283.05	AD. Production Factor	0.53
U. Second Look PY Review	0 @ \$20.00	\$0.00	AA. Certification Rate	255.00 @ \$2.74	\$698.70	AE. Dollar Volume/Hours	\$106.40
V. Tax One	0 @ \$7.00	\$0.00	AB. Total Plan Elemen	ts	\$2,184.34		
W. Family & Friends Billed	4 @ \$5.00	\$20.00					
X. Total Business Focus		\$222.50					

AF. Number of Paid Retu	irns and Ex	press File	ers
Tax Prep Fees	Count /	Rate Per	Total
Per Return	Volume	Return	Earned
\$1.00 - \$32.00	0.00	\$1.40	\$0.00
\$32.01 - \$64.00	5.00	\$4.27	\$21.35
\$64.01 - \$94.00	21.00	\$8.26	\$173.46
\$94.01 - \$126.00	25.00	\$11.81	\$295.25
\$126.01 - \$156.00	30.00	\$18.63	\$558.90
\$156.01 - \$189.00	40.00	\$22.77	\$910.80
\$189.01 - \$218.00	34.00	\$26.92	\$915.28
\$218.01 - \$250.00	25.00	\$32.14	\$803.50
\$250.01 - \$313.00	45.00	\$40.00	\$1,800.00
\$313.01 - \$375.00	21.00	\$52.33	\$1,098.93
\$375.01 - \$438.00	7.00	\$71.74	\$502.18
\$438.01 - \$499.00	0.00	\$82.91	\$0.00
\$499.01 - \$562.00	1.00	\$117.28	\$117.28
\$562.01 - \$625.00	1.00	\$130.26	\$130.26
Volume Over \$625.00	0.00	30.00%	\$0.00
Returns Over \$625.00	0.00		
AF. Total Paid Returns and EF's	255.00		
AG. Total Volume	\$52,179.00		
AH. Total Tax Preparation		;	\$ 7,327.19

Earnings Calculation		
1. Tax Preparation (Line AH)		\$7,327.19
2. Other Volume (Line K x 15.00%)		\$0.00
3. Total Business Focus (Line X)		\$222.50
4. Total Plan Elements (Line AB)		\$2,184.34
5. Other Wages (Line R)		\$132.24
6. Total (Add Lines 1 - 5)		\$9,866.27
7. Office Coordinator Bonus		\$0.00
8. *Additional Compensation		\$0.00
9. Total (Add Lines 6,7 and 8)		\$9,866.27
10. Total Hours Worked	489.48	
11. Actual Hourly Rate (Line 9/ Line 10)	\$20.16	
12. Overtime Pay		\$118.42
Overtime ((Line 11/2) x OT Hours)	\$118.42	
Doubletime ((Line 11) x DBT Hours)	\$0.00	
13. Total w/Overtime (Line 6 + Line 12)		\$9,984.69
14. All Wages Paid (Payroll)		\$7,142.19
15. Net Pay Due (Line 13 - Line 14)		\$2,842.50
16. Office Coordinator Bonus (Line 7)		\$0.00
17. Total Additional Compensation		\$0.00
*Additional Compensation (Line 8)	\$0.00	
<b>18. Total Due IP Plan</b> (Add Lines 15, 16 and 17)		\$2,842.50
19. Total Guarantee Due		\$0.00
20. Final Due Amount		\$2,842.50

*Line 8 Additional Comp:			

Total Earnings	
21. Total National Plan Earnings including Compensation Guarantee	\$0.00
22. Total IP Plan Earnings (Add Lines 13, 16 and 17)	\$9,984.69
23. Compensation Guarantee Amount (Line 21 - Line 22) (if zero or negative, amount entered is zero)	\$0.00

H&R BLOCK

April 30, 2008

Bettina Vonschweinitz 19101 Ganton Court Pflugerville, TX 78660» TY 2007

#### Dear Bettina,

We began Tax Season 2008 with one clearly defined goal: "Win the Last Two Feet"- the experience that takes place between our tax professionals and our clients at the tax desk. On behalf of US Retail Tax, I want to thank you for your outstanding efforts in achieving this year's goal and laying a strong foundation for the future.

Attached you will find your Individual Performance Plan (IPP) Compensation Report that provides you with detailed information about your total compensation earned during your contract period. It includes the amount of compensation previously paid and the final amount due, if applicable.

A returning client is one of the strongest validations we have to the quality of our services. To help you gauge your client retention success, we are providing you with your retention scores; including baseline retention, actual client retention, and your personal retention- if applicable. Baseline retention, while having no impact on your compensation, is a strong predictor of the likelihood of a client returning to Block next year. It takes into account a variety of external factors that may not be in your control such as client mix, demographics, office location, just to name a few. Every Tax Professional's baseline retention number is different and is based on the mix of clients seen by the Tax Professional. It also gives you a "baseline" to compare your actual client retention score to.

Your actual client retention score is just that: the percentage of clients you retained year over year. If your actual client retention is at or higher than baseline, you met or exceeded your goal this year. Achieving or exceeding baseline can be done by demonstrating value to the client for your services by spending time with the client, offering useful advice about savings and tax planning, and advising the client to adjust their W4 information, just to name a few. There are many ways you can perform positively to baseline retention.

Your personal client retention represents the percentage of clients you prepared last year that you prepared again this year.

If you are a first year tax professional- it has just begun- not only a new career, but you have set the stage for your retention opportunities next year. As you take classes to further your education this summer- you will not only learn new tax theory but also ways to help you serve your clients better.

Should you have questions about this report, please feel free to call me directly, or contact the service center at 1-877-266-7019. Plans are already underway to build upon this year's success. But you remain the key to our success. That's why we hope that you will consider joining your district team again next year. Together we will produce a season that benefits you, the company and our clients.

Sincerely,

Ralph Daniel Bartles Jr District Manager H&R Block, Inc.

Baseline: 67.76%

Actual Client Retention: 70.82%

Personal Client Retention:22.19%



Line		2008 MAIN					
	DATE 28Mar2008						
Α	DRAW REGULAR	14.67 F	RATE X	445.51	star hours =	6535.6317	
D+E	Training hours and	7.55 F	RATEX	17.52		132.276	
В	Overtime	22.005 F	X STAF	11.75		258.55875	
14	TOTAL DRAW						6,926.47
1	TAX PREPRATION	Net Volume from	below			6732.97	
AA	CERTIFICATION FLAT FEE Tax Adv 4	1	RETURNS ST	TURN (from E	240 265	657.6	
				NRESOLVED:	0		
				N HOLD/FRIE	18 5		
			AMENDS 20	06	2		
			HOTHER		2		
z	PRIOR EXPERIENCE FLAT FE	1.11	PER PAID RE	TURN	240	266.4	
s	POMS	4.5	PER POM SO	LD I	39	175.5	
w	Family & Friends Paid		Per \$20 charg	*****	4	20	
**	xIRA		PER XIRA SO		0	0	
	A						
	TOTAL COMMISSION BEFOR	E CLIENT RETER	NOITA				7,852.47
	TOTAL COMPENSATION DUE COMMISSION - DE		NT RETENTIO	ON)		·	926.00
Y	CLIENT RETENTION	4 99	PER RETURN	NING CLIENT	179	893,21	
T	OFFICE BONUS	4.55	LICILLIOIG	IIIIO OLILIII I		0	
	TOTAL COMPENSATION DUE						1,819.21
	TOTAL PAY EXPE	CTED					8,745.68
	MAIN OFFICE ONLY						
			2007 YEAR	2006 YEAR	2005 YEAR	<b>2004 YEAR</b>	2003 YEAR
	VOLUME =		48,056.00	64,402.00	33,704.00	42,642.14	28,339.00
	VOLUME		0.00	62,195.00			
	H&R COUPONS		0.00				
	HRS=		445.51	567.33	325.38	459.42	401
	RTNS=		240		183	251	185
	\$VOLUME PER RETURN = V	DLUME/PAID RE	200.23		184.17		153.18
	<b>\$VOLUME PER HOUR = VOL</b>		107.87	113.517706	103.58	92.82	70.67
	RETURNS PER HOUR = RET		0.53870845				0.4613466
	TOTAL PAY EXPECTED (REC	EIVED)	8,745.68	10633.08	7,538.10	8,731.41	4,865.90

Return cost	Qty		Rate/return	Volume
1-32.00		0	1.4	0
32.01 - 64.00		5	4.27	21.35
64.01 - 94.00		19	8.26	156.94
94.01 - 126.00		25	11.81	295.25
126.01 - 156.00		28	18.63	521.64
156.01 - 189.00		38	22.77	865.26
189.01 - 218.00		32	26.92	861.44
218.01 - 250.00		25	32.14	803.5
250.01 - 313.00		41	40	1640
313.01 - 375.00		17	52.33	889.61
375.01 - 438.00		6	71.74	430.44
438.01 - 499.00		0	82.91	0
499.01 - 562.00		1	117.28	117.28
562.01 - 625.00		1	130.26	130.26
625.01+		0	30%	Ó
Other		2		0
		240	L	

Total Paid Returns Line AF 6732.97 Total Volume Line AH and 1

48,056.00 From Line AG

#### **Tax Professional Compensation Report**

District Name: 42837 - AUSTIN 1, TX Office: 42993 - 3720 GATTIS SCHOOL RD

Channel	Earnings	Wages Already Paid	Compensatio
Regular Office (s)	\$8,722.12	\$5,916.01	\$2,806.1
Total Due IP Plan	\$8,722.12	\$5,916.01	\$2,806.1
Total Guarantee Due	\$3,085.43		\$3,085.4
Additional Compensation	\$0.00		\$0.00
Office Coordinator Compensation	\$0.00		\$0.0
Total Compensation Due	• • • • • • • • • • • • • • • • • • • •		\$3,085.4
Actual Hourly Rate (All Channels)			14.69

Channel Detail	Regular Offic	ce (s)
Hours Worked  A. Regular Hours B. Overtime Hours C. Doubletime Hours D. Training Hours E. Other Hours F. Total Hours Worked (Sum A - E)		532.39 13.82 0.00 23.37 17.32 586.90
Earnings from Other Wages G. All State Wages H. Click & Mortar Wages I. Training Wages J. Office Leader Meeting Wages K. Transition Plan Wages L. Other Wages M. Total Other Wages Earnings (Sum G - L)		\$0.00 \$0.00 \$233.67 \$0.00 \$151.25 \$384.92
Earnings from Business Focus Areas  N. Peace of Mind (POM) O. Second Look Review P. Second Look Prior Year Q. Tax One R. Family & Friends Billed S. Total Business Focus Earnings (Sum N - R)	36 @ \$4.50 1 @ \$10.00 4 @ \$10.00 0 @ \$7.00 0 @ \$5.00	\$162.00 \$10.00 \$40.00 \$0.00 \$212.00
Earnings from Plan Elements  T. Returned Clients U. Prior Related Experience (PRE) V. Certification W. Total Plan Elements Earnings (Sum T - V)	193 @ \$5.23 203 @ \$1.63 203 @ \$4.64	\$1,009.39 \$330.89 \$941.92 <b>\$2,282.20</b>

Earnings from Tax Preparation		
\$1.00 - \$34.00 \$34.01 - \$67.00 \$67.01 - \$98.00 \$98.01 - 132.00 \$132.01 - \$163.00 \$163.01 - \$198.00 \$198.01 - \$228.00 \$228.01 - \$262.00 \$262.01 - \$328.00 \$328.01 - \$393.00 \$393.01 - \$459.00 \$459.01 - \$522.00 \$522.01 - \$588.00 \$588.01 - \$654.00 Volume Over \$654.00 Returns Over \$654.00	4 @ \$1.49 23 @ \$4.53 4 @ \$8.79 10 @ \$13.06 21 @ \$19.74 37 @ \$24.42 36 @ \$28.90 28 @ \$34.20 20 @ \$42.89 12 @ \$55.92 7 @ \$75.98 1 @ \$88.80 0 @ \$124.21 0 @ \$138.46 \$0.00 @ 30.00% 0	\$5.96 \$104.1\$ \$35.16 \$130.66 \$414.52 \$903.52 \$1,040.46 \$957.66 \$857.86 \$671.02 \$531.86 \$88.86 \$0.00 \$0.00
X. Total Paid Returns and Express Filers Y. Total Paid Return and Express Filer Volume Z. Total Tax Preparation Earnings	203 \$40,888.00	\$5,741.49
Earnings from Other Volume		
AA. Total Net Tax Preparation Volume AB. Total Express Filer Volume AC. Total Base Volume (Sum of AA + AB) AD. Total Paid Return and Express Filer Volume (Line Y) AE. Total Other Volume (Line AC subtract AD) AF. Total Other Volume Earnings (Line AE X 15%)		\$40,888.06 \$0.00 \$40,888.06 \$40,888.00 \$0.06
O4h		
Other Items  AG. Total Returns (Including less than \$1.00) AH. Production Factor AI. Dollar Volume Per Hour AJ. PeopleSoft Hourly Rate		210 0.36 \$69.67 \$10.00
IPP Earnings Calculation		
1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)		\$384.92 \$212.00 \$2,282.20 \$5,741.49 \$0.01 \$8,620.62
7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)	586.90 \$14.69	\$101.50 \$0.00 \$101.50
12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll) 14. Total Due IP Plan (Line 12 subtract Line 13)		\$8,722.12 \$5,916.01 \$2,806.11
Additional Compensation:		

#### **Tax Professional Compensation Report**

District Name: 42837 - AUSTIN 1, TX Office: 42993 - 3720 GATTIS SCHOOL RD

Channel	Earnings	Wages Already Paid	
Office (s) Compensation Due	\$9,987.17	\$7,390.15	Compensatio \$2,597.0
Additional Compensation	\$0.00	\$1,000.10	\$0.0
Office Coordinator Compensation	\$0.00		\$0.0
otal Compensation Due	ψο.σσ		\$2,597.0
Actual Hourly Rate (All Channels)			\$15.6

Compensation Detail			
Hours Worked  A. Regular Hours B. Overtime Hours C. Doubletime Hours			558.71 34.63 0.00
D. Training Hours E. Other Hours F. Total Hours Worked (Sum A - E)			27.61 0.00 <b>620.95</b>
Earnings from Other Wages			
G. All State Wages H. Training Wages I. Office Leader Meeting Wages J. Transition Plan Wages K. Other Wages L. Total Other Wages Earnings (Sum G - K)			\$0.00 \$220.94 \$0.00 \$0.00 \$0.00 <b>\$220.94</b>
Earnings from Business Focus Areas			
M. Peace of Mind (POM) N. Second Look Review O. Second Look Prior Year P. Ask A Tax Advisor Q. Family & Friends Billed R. Total Business Focus Earnings (Sum M - Q)	57 @ 3 @ 4 @ 0 @ 1 @	\$4.50 \$10.00 \$10.00 \$5.00 \$5.00	\$256.50 \$30.00 \$40.00 \$0.00 \$5.00 <b>\$331.50</b>
Earnings from Plan Elements			
S. Returned Clients T. Prior Related Experience (PRE) U. Certification V. Total Plan Elements Earnings (Sum S - U)	170 @ 222 @ 222 @	\$5.23 \$2.09 \$4.64	\$889.10 \$463.98 \$1,030.08 <b>\$2,383.16</b>

Earnings from Tax Preparation		
\$1.00 - \$35.00	1 @ \$1.49	\$1.49
\$35.01 - \$68.00	24 @ \$4.53	\$108.72
\$68.01 - \$100.00	4 @ \$8.79	\$35.10
\$100.01 - 134.00	13 @ \$13.06	\$169.78
\$134.01 - \$166.00	19 @ \$19.74	\$375.06
\$166.01 - \$201.00	31 @ \$24.42	\$757.02
\$201.01 - \$232.00	49 @ \$28.90	\$1,416.10
\$232.01 - \$266.00	22 @ \$34.20	\$752.40
\$266.01 - \$334.00 \$334.01 - \$400.00	32 @ \$42.89 19 @ \$55.92	\$1,372.48 \$1,062.48
\$400.01 - \$467.00	4 @ \$75.98	\$303.92
\$467.01 - \$531.00	2 @ \$88.80	\$177.60
\$531.01 - \$598.00	2 @ \$124.21	\$248.4
\$598.01 - \$665.00	0 @ \$138.46	\$0.0
Volume Over \$665.00	\$0.00 @ 30.00%	\$0.00
Returns Over \$665.00	0	
W. Total Paid Returns and Express Filers	222	
X. Total Paid Return and Express Filer Volume	\$47,391.00	
Y. Total Tax Preparation Earnings	, ,== ==	\$6,780.63
Earnings from Other Volume		
		<b>.</b>
Z. Total Net Tax Preparation Volume		\$47,391.0
AA. Total Paid Return and Express Filer Volume (Line X) AB. Total Other Volume (Line AC subtract AA)		\$47,391.00 \$0.04
AC. Total Other Volume Earnings (Line AB X 15%)		\$0.0
Act Total Caller Volume Earlings (Ellic AD X 1070)		φο.ο
Other Items		
AD Tatal Dataman (Includes Includes the ext. 00)		000
AD. Total Returns (Including less than \$1.00)		
AE. Production Factor		0.36
AE. Production Factor AF. Dollar Volume Per Hour		0.36 \$76.32
AE. Production Factor		226 0.36 \$76.32 \$11.74
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate		0.36 \$76.32
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation		0.36 \$76.32 \$11.74
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M)		0.36 \$76.32 \$11.74 \$220.94
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S)		\$220.94 \$331.50
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W)		\$76.33 \$11.74 \$220.9 \$331.55 \$2,383.10
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z)		\$220.9 \$331.5 \$2,383.1 \$6,780.6
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W)		\$220.94 \$331.56 \$2,383.14 \$6,780.66 \$0.00
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF)		0.36 \$76.32
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)	620.95	\$220.9 \$331.5 \$2,383.11 \$6,780.6 \$0.0
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F)	620.95 \$15.65	\$220.94 \$331.56 \$2,383.14 \$6,780.66 \$0.00
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)		\$220.9 \$331.5 \$2,383.1 \$6,780.6 \$9,716.2
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C)		\$220.94 \$331.50 \$2,383.16 \$6,780.63 \$0.00 \$9,716.24
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B)		\$220.94 \$331.56 \$2,383.16 \$6,780.63 \$0.00 \$9,716.24
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C)		\$220.94 \$331.56 \$2,383.16 \$6,780.63 \$0.00 \$9,716.24
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)		\$220.94 \$331.50 \$2,383.14 \$6,780.60 \$9,716.24 \$270.90 \$270.90 \$9,987.17
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)  12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll)		\$220.94 \$331.50 \$2,383.16 \$6,780.63 \$0.00 \$9,716.24 \$270.93 \$0.00 \$270.93
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)		\$220.94 \$331.56 \$2,383.16 \$6,780.66 \$0.00 \$9,716.24 \$270.93 \$9,987.11 \$7,390.15
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)  12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll)		\$220.94 \$331.50 \$2,383.16 \$6,780.63 \$0.01 \$9,716.24 \$270.93 \$0.00 \$270.93
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)  12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll) 14. Total Due IP Plan (Line 12 subtract Line 13)		\$220.9 \$331.5 \$2,383.1 \$6,780.6 \$0.0 \$9,716.2 \$270.9 \$0.00 \$270.9 \$9,987.1 \$7,390.1
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)  12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll)		\$220.94 \$331.56 \$2,383.16 \$6,780.65 \$9,716.24 \$270.95 \$9,987.17 \$7,390.15
AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate  IPP Earnings Calculation  1. Total Other Wages Earnings (Line M) 2. Total Business Focus Earnings (Line S) 3. Total Plan Element Earnings (Line W) 4. Total Tax Preparation Earnings (Line Z) 5. Total Other Volume Earning (Line AF) 6. Total (Sum of Lines 1 - 5)  7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AJ 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)  12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll) 14. Total Due IP Plan (Line 12 subtract Line 13)		\$220.94 \$331.50 \$2,383.16 \$6,780.63 \$0.01

#### **Tax Professional Compensation Report**

District Name: 19208 - MONTGOMER Office: 19476 - SHOPS AT TOWN CENTER

	Compensation Su	mmary	
Channel Office (s) Compensation Due Additional Compensation Office Coordinator Compensation Total Compensation Due Actual Hourly Rate	Earnings 13,694.28 \$0.00 \$0.00	Wages Already Paid \$6,407.17	Compensation \$7,287.11 \$0.00 \$0.00 \$7,287.11 \$24.58

Compensation Detail			
Hours Worked			
A. Regular Hours			508.59
B. Overtime Hours			12.49
C. Doubletime Hours			0.00
D. Training Hours			29.85
E. Other Hours			0.00
F. Total Hours Worked (Sum A - E)			550.93
Earnings from Other Wages			
C All State Messas			\$0.00
G. All State Wages H. Training Wages			\$0.00 \$216.41
I. Office Leader Meeting Wages			\$0.00
J. Transition Plan Wages			\$0.00
K. Other Wages			\$0.00
L. Total Other Wages Earnings (Sum G - K)			\$216.41
			·
Earnings from Business Focus Areas			
Earnings noin Business Focus Areas			
M. Peace of Mind (POM)	44 @	\$5.25	\$231.00
N. Second Look Review	2 @		\$20.00
O. Second Look Prior Year	1 @	\$10.00	\$10.00
P. Ask A Tax Advisor	0 @	\$5.00	\$0.00
Q. Family & Friends Billed	0 @	\$5.00	\$0.00
R. Total Business Focus Earnings (Sum M - Q)			\$261.00
Earnings from Plan Elements			
S. Returned Clients	148 @	\$4.99	\$738.52
T. Prior Related Experience (PRE)	309 @	\$2.74	\$846.66
U. Certification	309 @	\$10.41	\$3,216.69
V. Total Plan Elements Earnings (Sum S - U)			\$4,801.87
· /			

Earnings from Tax Preparation		
\$1.00 - \$35.00 \$35.01 - \$68.00 \$68.01 - \$100.00 \$100.01 - 134.00 \$134.01 - \$166.00 \$166.01 - \$205.00 \$205.01 - \$241.00 \$241.01 - \$282.00 \$282.01 - \$354.00 \$354.01 - \$424.00 \$424.01 - \$495.00 \$495.01 - \$563.00 \$563.01 - \$634.00 \$634.01 - \$705.00 Volume Over \$705.00 Returns Over \$705.00	5 @ \$1.40 33 @ \$4.27 26 @ \$8.26 10 @ \$12.46 38 @ \$18.63 37 @ \$23.07 46 @ \$27.32 42 @ \$32.34 38 @ \$40.65 22 @ \$52.33 9 @ \$71.74 3 @ \$83.91 0 @ \$117.28 0 @ \$132.26 \$0.00 @ 30.00%	\$7.00 \$140.91 \$214.76 \$124.60 \$707.94 \$853.59 \$1,256.72 \$1,358.28 \$1,544.70 \$1,151.26 \$645.63 \$251.73 \$0.00 \$0.00
W. Total Paid Returns X. Total Paid Return Volume Y. Total Tax Preparation Earnings	309 \$64,564.65	\$8,257.15
Earnings from Other Volume		
Z. Total Net Tax Preparation Volume AA. Total Paid Return Volume (Line X) AB. Total Other Volume (Line AC subtract AA) AC. Total Other Volume Earnings (Line AB X 15%)		\$64,593.69 \$64,564.65 \$29.04 \$4.36
Other Items		
AD. Total Returns (Including less than \$1.00) AE. Production Factor AF. Dollar Volume Per Hour AG. PeopleSoft Hourly Rate		318 0.58 \$117.24 \$11.74
IPP Earnings Calculation		
1. Total Other Wages Earnings (Line L) 2. Total Business Focus Earnings (Line R) 3. Total Plan Element Earnings (Line V) 4. Total Tax Preparation Earnings (Line Y) 5. Total Other Volume Earning (Line AC) 6. Total (Sum of Lines 1 - 5)		\$216.41 \$261.00 \$4,801.87 \$8,257.15 \$4.36 \$13,540.79
7. Total Hours Worked (Line F) 8. Actual Hourly Rate (Line 6/Line 7) OR Line AG 9. Actual OVT Pay (Line 8/2) X Line B) 10. Actual DBT Pay (Line 8 X Line C) 11. Total OVT/DBT Pay (Sum of Lines 9 & 10)	550.93 \$24.58	\$153.49 \$0.00 \$153.49
12. Total w/Overtime (Sum of Lines 6 & 11) 13. All Wages Paid (Payroll) 14. Total Due IP Plan (Line 12 subtract Line 13)		\$13,694.28 \$6,407.17 \$7,287.11
Additional Compensation:		

#### **Tax Professional Compensation Report - Retail**

District Name: 19206 - BELTWAY NO Office: 19476 - SHOPS AT TOWN CENTER

	Compensation Su	mmary	
Channel	Earnings	Wages Already Paid	Compensation
Office (s) Compensation Due	\$9,052.15	\$6,110.72	\$2,941.43
Additional Compensation	\$0.00		\$0.00
Client Service Leader STI	\$0.00		\$0.00
CSL STI and Additional Comp Overtime Recalculate	\$0.00		\$0.00
Total Compensation Due			\$2,941.43
Actual Hourly Rate			\$39.42

Compensation Detail			
Hours Worked			
A. Regular Hours			218.61
B. Overtime Hours			0.00
C. Doubletime Hours D. Training Hours			0.00 11.00
E. Other Hours			0.00
F. Total Hours Worked (Sum A - E)			229.61
Earnings from Other Wages			
G. All State Wages			\$0.00
H. Training Wages I. Client Service Leader Meeting Wages			\$88.00 \$0.00
J. Transition Plan Wages			\$0.00
K. Other Wages			\$0.00
L. Total Other Wages Earnings (Sum G - K)			\$88.00
Earnings from Tax Plus Products			
M. Peace of Mind (POM)	33 @	\$5.25	\$173.25
N. Emerald Card	12 @	\$7.00	\$84.00
O. Total Tax Plus Product Earnings (Sum M - N)			\$257.25
Earnings from Plan Elements			
P. New Client Retention Count	116 @	\$7.50	\$870.00
Q. Established Client Retention Count	219 @	\$6.00	\$1,314.00
R. Prior Related Experience (PRE)	119 @	\$3.00	\$357.00
S. Certification	119 @	\$11.00	\$1,309.00
T. Total Plan Elements Earnings (Sum P - S)			\$3,850.00

Name:	Vonschweinitz, Bettina	<b>Employee</b> : 369280	Date:	4/28/2014
Earnin	ngs from Tax Preparation			
\$36.01 \$69.01 \$102.0 \$136.0 \$169.0 \$245.0 \$287.0 \$360.0 \$432.0 \$504.0 \$573.0 Volume	- \$36.00   - \$69.00   - \$102.00   1 - \$136.00   1 - \$169.00   1 - \$209.00   1 - \$245.00   1 - \$287.00   1 - \$360.00   1 - \$360.00   1 - \$573.00   1 - \$573.00   1 - \$645.00   1 - \$718.00   2 Over \$718.00   3 Over \$718.00		0 @ \$1.50 0 @ \$5.50 15 @ \$9.00 4 @ \$14.00 10 @ \$20.00 7 @ \$25.00 17 @ \$30.00 25 @ \$37.00 24 @ \$48.00 5 @ \$60.00 6 @ \$78.00 3 @ \$95.00 0 @ \$130.00 0 @ \$160.00 \$2,410.75 @ 0.27	\$0.00 \$0.00 \$135.00 \$56.00 \$200.00 \$175.00 \$510.00 \$925.00 \$1,152.00 \$300.00 \$468.00 \$285.00 \$0.00 \$650.90
V. Tota	al Paid Returns al Paid Return Volume tal Tax Preparation Earnings		119 \$31,561.48	\$4,856.90
Earnin	ngs from Other Volume			
<b>Y.</b> Tota <b>Z.</b> Tota	al Net Tax Preparation Volume al Paid Return Volume (Line V) al Other Volume (Line X subtract Y) otal Other Volume Earnings (Line Z X 15%)			\$31,561.48 \$31,561.48 \$0.00 <b>\$0.00</b>
Other	Items			
AC. Pr AD. Do	otal Returns (Including less than \$1.00) roduction Factor ollar Volume Per Hour eopleSoft Hourly Rate			120 0.52 \$137.46 \$27.55
IPP Ea	arnings Calculation			
2. Tota 3. Tota 4. Tota 5. Tota	al Other Wages Earnings (Line L) al Tax Plus Products Earnings (Line O) al Plan Element Earnings (Line T) al Tax Preparation Earnings (Line W) al Other Volume Earnings (Line AA) al (Sum of Lines 1 - 5)			\$88.00 \$257.25 \$3,850.00 \$4,856.90 \$0.00 \$9,052.15
<b>8.</b> Actu <b>9.</b> Actu <b>10.</b> Act	al Hours Worked (Line F) ual Hourly Rate (Line 6/Line 7) OR Line AE ual OVT Pay (Line 8/2) X Line B) tual DBT Pay (Line 8 X Line C) tal OVT/DBT Pay (Sum of Lines 9 & 10)		229.61 \$39.42	\$0.00 \$0.00 \$0.00
13. All	tal w/Overtime (Sum of Lines 6 & 11) Wages Paid (Payroll) tal Due IP Plan (Line 12 subtract Line 13)			\$9,052.15 \$6,110.72 \$2,941.43
Additio	onal Compensation:			

<sup>\*</sup> Not included in Additional Compensation overtime recalculation

My TPCR Page 1 of 2

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Tools & Libraries

APPLICATIONS DOCUMENTS

WEBSITES

PEOPLE DIRECTORY

Retail  The information provided above ONLY estimates; the actual cor	stimated Earnings (Line 12): \$3,103.20 e reflects a good faith estimate of mpensation may be more or less ten this report and the Company of A - E)	Summary  Wages Already Paid (Line 13): \$1,346.70 of the eamings potential which you a s. You will receive a final report show's final calculation pursuant to the Correct Retail Hours Worked	Estimated C re likely to receive a ring your actual pay ompensation Inform	at the completion of yout after all final ca	f the tax se	eason. These calc	the extent
Retail The information provided above ONLY estimates; the actual corthere is any discrepancy betwee shall prevail.  A. Regular Hours B. Overtime Hours C. Doubletime Hours D. Training Hours E. Other Hours F. Total Hours Worked (Sum) G. All State Wages H. Training Wages I. Client Service Leader Meeting J. Transition Plan Wages K. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) N. Emerald Card O. Ask a Tax Advisor	\$3,103.20 e reflects a good faith estimate of mpensation may be more or less ten this report and the Company of A - E)	Wages Already Paid (Line 13): \$1,346.70 of the earnings potential which you a s. You will receive a final report show 's final calculation pursuant to the Co	re likely to receive a ving your actual pay compensation Inform	\$1,7 at the completion of yout after all final ca	f the tax se	eason. These calc	On Pac culations are the extent calculation  104.  0.0  11.9  20.7  136.4
Retail The information provided above ONLY estimates; the actual corner is any discrepancy between shall prevail.  A. Regular Hours B. Overtime Hours C. Doubletime Hours D. Training Hours E. Other Hours F. Total Hours Worked (Sum) G. All State Wages H. Training Wages I. Client Service Leader Meeting J. Transition Plan Wages K. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) N. Emerald Card D. Ask a Tax Advisor	\$3,103.20 e reflects a good faith estimate of mpensation may be more or less ten this report and the Company of A - E)	Wages Already Paid (Line 13): \$1,346.70 of the earnings potential which you a s. You will receive a final report show 's final calculation pursuant to the Co	re likely to receive a ving your actual pay compensation Inform	\$1,7 at the completion of yout after all final ca	f the tax se	eason. These calc	On Pa culations are the extent calculation 104. 0. 0. 11. 20.
Retail The information provided above ONLY estimates; the actual corontere is any discrepancy betwee shall prevail.  A. Regular Hours B. Overtime Hours C. Doubletime Hours D. Training Hours E. Other Hours F. Total Hours Worked (Sum) G. All State Wages H. Training Wages I. Client Service Leader Meeting J. Transition Plan Wages K. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) N. Emerald Card O. Ask a Tax Advisor	\$3,103.20 e reflects a good faith estimate of mpensation may be more or less ten this report and the Company of A - E)	\$1,346.70 of the earnings potential which you a s. You will receive a final report show 's final calculation pursuant to the Co  Retail  Hours Worked	re likely to receive a ving your actual pay compensation Inform	\$1,7 at the completion of yout after all final ca	f the tax se	eason. These calc	On Pa culations are the extent calculation 104 0 0 111 20 136.
The information provided above ONLY estimates; the actual corthere is any discrepancy betwee shall prevail.  A. Regular Hours B. Overtime Hours C. Doubletime Hours D. Training Hours E. Other Hours F. Total Hours Worked (Sum G. All State Wages H. Training Wages Client Service Leader Meeting J. Transition Plan Wages C. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) N. Emerald Card D. Ask a Tax Advisor	e reflects a good faith estimate of mpensation may be more or less ten this report and the Company of A - E)	for the earnings potential which you a s. You will receive a final report show 's final calculation pursuant to the Co-Retail Hours Worked	ring your actual pay	at the completion of yout after all final ca	f the tax sealculations	are complete. To	ulations are the extent calculation  104 0 0 111 20 136.
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I. Transition Plan Wages C. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) I. Emerald Card D. Ask a Tax Advisor	g Wages						\$98
C. Other Wages L. Total Earnings from Other M. Peace of Mind (POM) I. Emerald Card D. Ask a Tax Advisor							\$0
L. Total Earnings from Other  M. Peace of Mind (POM)  I. Emerald Card  D. Ask a Tax Advisor							\$(
M. Peace of Mind (POM)  J. Emerald Card  J. Ask a Tax Advisor							\$20
I. Emerald Card  D. Ask a Tax Advisor	Wages (Sum of G - K)						\$305
I. Emerald Card  D. Ask a Tax Advisor		Earnings from Tax Plus P	roducts				
D. Ask a Tax Advisor				16.00	@	\$5.25	\$84
				1.00	@	\$7.00	\$7
. rax idenility Shleid - raxpaye				0.00	@	\$5.00	\$(
2. Tax Identity Shield - Spouse				3.00 0.00	@ @	\$3.00 \$1.00	\$9 \$0
				0.00	w	φ1.00	
R. Total Tax Plus Products E	armings (Sum of M - Q)	Familia o for o Bio Ti					\$100
		Earnings from Plan Ele	ments				
5. 1st And 2nd Year Client Rete				16.00	@	\$7.50	\$120
<ul> <li>3 Plus Years Client Retention</li> <li>Prior Related Experience (PF</li> </ul>				64.00 41.00	@	\$6.00 \$3.00	\$384 \$123
<ol> <li>Prior Related Experience (Prior Certification)</li> </ol>	NL)			41.00	@ @	\$3.00 \$11.00	\$123 \$451
W. Total Plan Element Earnin	ngs (Sum of S - V)			71.00	<b>w</b>	ψ11.00	\$1,078
Star i ian Element Edillill	190 (Julii Oi O - V)	Earnings from Tax Prepa	aration				ψ1,070
51.00 - \$36.00		Earnings from Tax Prepa	ai aliUii	0.00	@	\$1.50	\$(
36.01 - \$69.00				2.00	@	\$5.50	\$1
\$69.01 - \$102.00				5.00	@	\$9.00	\$45
\$102.01 - \$136.00				2.00	@	\$14.00	\$28
\$136.01 - \$169.00				1.00	@	\$20.00	\$20

My TPCR Page 2 of 2

\$209.01 - \$245.00	4.00	@	\$30.00	\$120.00
\$245.01 - \$287.00	6.00	@	\$37.00	\$222.00
\$287.01 - \$360.00	13.00	@	\$48.00	\$624.00
\$360.01 - \$432.00	2.00	@	\$60.00	\$120.00
\$432.01 - \$504.00	0.00	@	\$78.00	\$0.00
\$504.01 - \$573.00	1.00	@	\$95.00	\$95.00
\$573.01 - \$645.00	2.00	@	\$130.00	\$260.00
\$645.01 - \$718.00	0.00	@	\$160.00	\$0.00
Returns Over \$718.00	0.00			
Volume from returns over \$718.00	\$0.00	@	27%	\$0.00
X. Total Paid Returns	41.00			
Y. Total Paid Return Volume(Line AA subtract AC)	\$10,748.35			
Z. Total Tax Preparation Earnings				\$1,620.00
Earnings from Other	Volume			
AA. Total Net Tax Preparation Volume				\$10,748.35
AB. Total Paid Return Volume (Line Y)				\$10,748.35
AC. Total Other Volume (Line AA subtract AB)				\$0.00
AD. Total Other Volume Earnings (Line AC X 15%)				\$0.00
Other Items				
AE. Total Returns (Includes Returns Less than \$1.00)				40.00
AF. Production Factor				0.29
AG. Dollar Volume Per Hour				\$78.80
AH. PeopleSoft Hourly Rate				\$10.00
IPP Earnings Calcu	ılation			
1. Total Other Wages Earnings (Line L)				\$305.20
2. Total Tax Plus Products Earnings (Line R)				\$100.00
3. Total Plan Element Earnings (Line W)				\$1,078.00
4. Total Tax Preparation Earnings (Line Z)				\$1,620.00
5. Total Other Volume Earnings (Line AD)				\$0.00
6. Total (Sum of Lines 1 - 5)				\$3,103.20
7. Total Hours Worked (Line F)				136.40
8. Actual Hourly Rate (Line 6/Line 7) OR (Line AH)				\$22.75
9. Actual OVT Pay ((Line 8/2) X Line B)				\$0.00
10. Actual DBT Pay (Line 8 X Line C)				\$0.00
11. Total OVT/DBT Pay (Sum of Lines 9 & 10)				\$0.00
12. Total w/Overtime (Sum of Lines 6 & 11)				\$3,103.20
13. All Wages Paid (Payroll)				\$1,346.70
14. Total Due IP Plan (Line 12 subtract Line 13)				\$1,756.50

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MON, APR 25, 2016 10:57 AM

NYSE HRB 24.17 +0.34





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### My Tax Professional Compensation Report (TPCR) - Estimate

Help

		Summary		
	Estimated Earnings	Wages Already Paid	Estimated Compensation	Eligibility Status
Retail	-\$1,051.88	\$1,362.02	\$-310.14	Not on Pace
Block Advisors Incentive	\$128.00			

The information provided above reflects a good faith estimate of the earnings potential which you are likely to receive at the completion of the tax season. These calculations are ONLY estimates; the actual compensation may be more or less. You will receive a final report showing your actual payout after all final calculations are complete. To the extent there is any discrepancy between this report and the Company's final calculation pursuant to the Compensation Information Sheet you received, the Company's final calculation shall prevail.

Retail

**Hours Worked** 

A. Regular Hours 60.80 B. Overtime Hours 0.00

C. Doubletime Hours 0.00 4/25/2016 My TPCR

29/20/16	My IPCR			
D. Training Hours				24.87
E. Other Hours				3.80
F. Total Hours Worked (Sum of A - E)				89.47
Earnings fro	m Other Wages			
G. All State Wages				\$0.00
H. Training Wages				\$211.38
I. Client Service Leader Meeting Wages				\$0.00
J. Transition Plan Wages				\$0.00
K. Other Wages				\$38.00
L. Total Earnings from Other Wages (Sum of G - K)				\$249.38
Earnings from	Tax Plus Products			
M. Peace of Mind (POM)	0.00	@	\$5.25	\$0.00
N. Emerald Card	1.00	@	\$4.00	\$4.00
O. Tax Identity Shield - Taxpayer	2.00	@	\$3.00	\$6.00
P. Tax Identity Shield - Spouse/Dependent	0.00	@	\$1.00	\$0.00
Q. Total Tax Plus Products Earnings (Sum of M - P)				\$10.00
Earnings from	n Plan Elements			
R. 1st And 2nd Year Client Retention	13.00	@	\$7.50	\$97.50
S. 3 Plus Years Client Retention	16.00	@	\$6.00	\$96.00
T. Prior Related Experience (PRE)	15.00	@	\$3.00	\$45.00
U. Certification	15.00	@	\$11.00	\$165.00
V. Total Plan Element Earnings (Sum of S - U)				\$403.50
Earnings from	Tax Preparation			
\$1.00 - \$38.00	0.00	@	\$1.50	\$0.00
\$38.01 - \$73.00	4.00	@	\$5.50	\$22.00
\$73.01 - \$108.00	2.00	@	\$9.00	\$18.00
\$108.01 - \$143.00	1.00	@	\$14.00	\$14.00
\$143.01 - \$178.00	1.00	@	\$20.00	\$20.00
\$178.01 - \$220.00	1.00	@	\$25.00	\$25.00
\$220.01 - \$258.00	0.00	@	\$30.00	\$0.00
\$258.01 - \$301.00	2.00	@	\$37.00	\$74.00
\$301.01 - \$378.00	2.00	@	\$48.00	\$96.00

4/25/2016 My TPCR

,				
\$378.01 - \$454.00	2.00	@	\$60.00	\$120.00
\$454.01 - \$530.00	0.00	@	\$78.00	\$0.00
\$530.01 - \$602.00	0.00	@	\$95.00	\$0.00
\$602.01 - \$678.00	0.00	@	\$130.00	\$0.00
\$678.01 - \$754.00	0.00	@	\$160.00	\$0.00
Returns Over \$754.00	0.00			
Volume from returns over \$754.00	\$0.00	@	27%	\$0.00
W. Total Paid Returns	15.00			
X. Total Paid Return Volume(Line AA subtract AC)	\$2,929.25			
Y. Total Tax Preparation Earnings				\$389.00
Earnings from Other V	/olume			
AA. Total Net Tax Preparation Volume				\$2,929.25
AB. Total Paid Return Volume (Line Y)				\$2,929.25
AC. Total Other Volume (Line AA subtract AB)				\$0.00
AD. Total Other Volume Earnings (Line AC X 15%)				\$0.00
Other Items				
AE. Total Returns (Includes Returns Less than \$1.00)				15.00
AF. Production Factor				0.17
AG. Dollar Volume Per Hour				\$32.74
AH. PeopleSoft Hourly Rate				\$18.30
IPP Earnings Calcula	ation			
1. Total Other Wages Earnings (Line L)				\$249.38
2. Total Tax Plus Products Earnings (Line R)				\$10.00
3. Total Plan Element Earnings (Line W)				\$403.50
4. Total Tax Preparation Earnings (Line Z)				\$389.00
5. Total Other Volume Earnings (Line AD)				\$0.00
6. Total (Sum of Lines 1 - 5)				\$1,051.88
7. Total Hours Worked (Line F)				89.47
8. Actual Hourly Rate (Line 6/Line 7) OR (Line AH)				\$18.30
9. Actual OVT Pay ((Line 8/2) X Line B)				\$0.00

0. Actual DBT Pay (Line 8 X Line C)	\$0.00
1. Total OVT/DBT Pay (Sum of Lines 9 & 10)	\$0.00
2. Total w/Overtime (Sum of Lines 6 & 11)	\$1,051.8
3. All Wages Paid (Payroll)	\$1,362.02
14. Total Due IP Plan (Line 12 subtract Line 13)	\$ C
Block Advisors	
Block Advisors' New Client Revenue Incentive	
A.Last Year's New Client Revenue	\$0.0
3.This Year's New Client Revenue	\$510.0
This Year's New Client Threshold (110% of Last Year)	\$0.0
D.Revenue qualifying for the incentive	\$510.0
E. New Client Revenue Incentive paid (25% of qualifying revenue)	\$128.00

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### IRS PTIN

### TY2003 to TY2022



BETTINA VON SCHWEINITZ 13125 PICKERING DR GERMANTOWN, MD 20874-3816 Date of this Notice: 12/17/2003 Number of this Notice: **CP-571** 

Form: W-7P

Case Reference Number:

52691350000263

Date of birth: 10/09/1959

For assistance call: 1-866-255-0654

Or you may write to us at: Internal Revenue Service Brookhaven Service Center PTIN Unit Stop - 540A P.O. Box 9003, Attn: EIN Operation Holtsville,NY 00501

### WE ASSIGNED YOU AN IRS PREPARER TAX IDENTIFICATION NUMBER (PTIN)

Thank you for your Form W-7P, Application for Preparer Tax Identification Number. We assigned you PTIN P00405019. Please keep this notice for your records.

This PTIN is not a Social Security Number (SSN) and is used on income tax returns you prepare in lieu of your personal Social Security Number. Use your PTIN when completing the "Paid Preparer's Use" area of any U.S. Federal income tax return.

If you have any questions regarding this letter, please call or write to us using the information shown above. If you write to us, please include your name, telephone number, the hours we can reach you, and a copy of this notice.

This card is the property of the Internal Revenue Service (IRS). Use of this card signifies agreement to the current conditions set forth by the IRS.

This card is **not** valid unless signed by the person identified on the front.

If found mail to: IRS, PTIN Unit P. O. Box 447 Bensalem, PA 19020

Contact the Philadelphia Service Center on (215) 516-4846 regarding this card.



Form **12445** (9-1999) Catalog Number 28553M www.irs.gov



**Preparer's Tax Identification Number** 

P00405019

This number has been established for

BETTINA VON SCHWEINITZ

To be used on tax returns prepared for compensation

Signature

# Improve Tax Administration and Your Business

The Internal Revenue Service recently announced a fundamental change in how the agency will regulate the tax return preparation industry. These new regulations and procedures will better serve taxpayers, tax administration and the tax professional industry.

The requirements take effect on January 1, 2011, and include: mandatory preparer tax identification numbers (PTINs), competency testing, continuing education, ethical standards and electronic filing. So, don't delay! Get details on the first steps to building your business inside – or at www.IRS.gov/taxpros.

For purposes of PTIN registration, a tax return preparer is an individual who, for compensation, prepares all or substantially all of a federal tax return or claim for refund.

# New e-file Mandate

Beginning January 1, 2011, a new law requires certain tax return preparers to file returns electronically. If you are not already an Authorized IRS e-file Provider or need more information on the new law, visit www.IRS.gov, keyword e-file provider, for more information.

# **Ethical Standards Expanded**

Under proposed regulations published in August 2010, all tax return preparers will be subject to the standards of conduct reprinted in Treasury Department Circular 230.

Registered tax return preparers will be authorized to prepare tax returns, but their authority to represent taxpayers will be limited to examinations involving tax returns they have prepared.

Representation rules for attorneys, CPAs and enrolled agents will remain unchanged.

ATTENTION: The IRS encourages all tax return preparers to resolve any outstanding tax issues prior to registering for a PTIN. Under the new requirements, the IRS will verify compliance with personal and business tax obligations.



Publication 4889 (9-2010) Catalog Number 55745Y
Department of the Treasury Internal Revenue Service www.irs.gov

2010

# Three Steps to Becoming a Registered Tax Return Preparer

### Step One



# Sign Up Electronically

- All tax return preparers, including those tax return preparers who are attorneys, certified public accountants (CPAs), and enrolled agents, must have PTINs if they prepare tax returns after December 31, 2010.
- Access a new online PTIN sign-up system through www.IRS.gov/taxpros. There is a \$64.25 annual fee.
- Tax return preparers who already have PTINs must also pay the fee and sign up using the new system. They will be assigned the same PTIN as long as IRS can authenticate the applicant.



## Competency Exam

- Under proposed regulations published in August 2010, tax return preparers must pass a competency test to officially become a registered tax preparer. The IRS expects testing to begin in mid-2011.
- Tax return preparers who have PTINs before testing becomes available will have until Dec. 31, 2013, to pass the competency test. After testing becomes available, new tax return preparers will be required to pass the competency test before they can obtain a PTIN.
- Attorneys, CPAs and enrolled agents will be exempt from the competency test requirement. Enrolled actuaries and enrolled retirement plan agents will be exempt if they only prepare returns within their limited practice areas. More guidance on testing, the testing fee, and any other exempt individuals will be available in spring 2011.



## Continuing Education

- Under proposed regulations published in August 2010, registered tax return preparers will be required to complete continuing education annually. The annual continuing education requirement is expected to include 3 hours of federal tax law updates, 2 hours of ethics, and 10 hours of other federal tax law.
- This will not apply to attorneys, CPAs, enrolled agents, enrolled actuaries, or enrolled retirement plan agents due to their existing education requirements.
- The beginning date for continuing education has not been determined.
- Continuing education credit opportunities will be available from a variety of approved sources. More guidance will be available through www.IRS.gov/taxpros.



### **Alert Article**



Preparer Tax Identification Number (PTIN) Registration

**Audience:** 

Company Offices

Posted On:

09/28/2010

Message:

By now, you have received the message from Phil Mazzini that H&R Block will be paying for the IRS registration fee for you, our Tax Professionals. The question is: What do I do next?

Here are the things you should be doing right now!

- Hold off on registering through the IRS site. H&R Block has detailed processes to assist you with this registration and to pay on your behalf. Important: Payment for the registration fee will only be available for those company Tax Professionals who have successfully completed the AHP hiring process and background checks prior to registration.
- Ensure you have a personal email account/address. We have learned that this is mandatory to utilize the new IRS site to register online for a PTIN. Free accounts can be set up at www.yahoo.com, www.gmail.com, www.hotmail.com. etc. Do not use your Block email address for this purpose. This is a critical communication channel between you and the IRS. Most tax professionals do not have access to Block e-mail in the off-season. If you do not choose to get a personal email address, your alternative is to apply using the paper application, which will take close to 4-6 weeks.
- Look for an invite from your District Manager (DM) or District Operations Coordinator (DOC) to an in-office registration event prior to registering! This invitation will provide you a list of everything that you will need to do beforehand and bring with you to the registration event.
- Review the H&R Block PowerPoint/PDF or take the H&R Block CBT on the IRS registration process. While it will take a little longer to get the CBT completed now that the IRS site has opened, we will still have a PowerPoint/PDF version of the CBT available to you on the Knowledge Development site by Wednesday, October 6th. The CBT should be available by October 13th.

Stay tuned for more info from your local leadership regarding when to start registering and check out the IRS return preparer site at MBTO>myCareer>Employment>Return Preparer Initiative for all the updated information.

All Alerts



Main Menu Logoff

Logged in as vonschweinitz, Bettina

### **PTIN Application Confirmation**

Press "Next" to continue.

### **PTIN Application Confirmation**

Your application for a PTIN has been accepted. The following are details about your PTIN.

Name:

**Bettina vonschweinitz** 

PTIN: Status: P00405019

Provisional 11/30/2011

**Expiration Date:** 

You must use this number on any tax return or claim for refund you sign as a paid tax return preparer on or after January 1, 2011. In the past, tax return preparers could choose to use their social security numbers when they signed tax returns or claims for refund they prepared for a fee. As of January 1, 2011, this practice is no longer allowed.

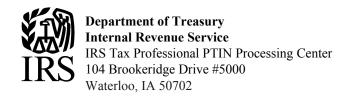
You may wish to print this page for your records. Also, a welcome letter containing your PTIN and additional guidance will be emailed to you generally within 24 hours.

If you need further assistance with the online PTIN system, contact the IRS Tax Professional PTIN Information Line.

Next

IRS Privacy Policy | IRS Tax Professional PTIN Line | Frequently Asked Questions

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Letter	4763
Date	November 09, 2011
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19931 SWEETGUM CIR APT 23 GERMANTOWN, MARYLAND 20874

Dear Tax Professional,

We've accepted your 2012 renewal for your Preparer Tax Identification Number (PTIN)

Your 2012 PTIN is P00405019 (File Number: 182512)

Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Additional requirements for some preparers

Unless you are an attorney, Certified Public Accountant, Enrolled Agent, Enrolled Retirement Plan Agent, or Enrolled Actuary, you may have additional steps you must take to retain your PTIN. To view your individual next steps, log into your online account at www.IRS.gov/ptin and select "Next Steps" from the Main Menu. Be sure to note the deadlines for any next steps you may have to complete.

Enrolled Retirement Plan Agents and Enrolled Actuaries who prepare Form 1040 series returns also have a testing requirement. View your "Next Steps" and deadlines from the Main Menu as described above.

### **Keep your PTIN information current**

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin. You can also update your PTIN account by calling the PTIN Information Line.

### **Additional Information**

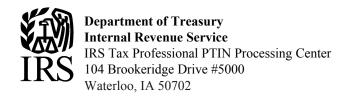
For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/ptin.

If you need additional assistance, please contact the IRS Tax Professional PTIN Information Line:

**Primary toll-Free:** 877-613-PTIN (7846)

**TTY:** 877-613-3686

Toll number for international callers: +1 915-342-5655



Letter	4763
Date	November 03, 2012
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19931 SWEETGUM CIR APT 23 GERMANTOWN, MARYLAND 20874

Dear Tax Professional,

We've accepted your 2013 renewal for your Preparer Tax Identification Number (PTIN)

Your 2013 PTIN is P00405019 (File Number: 182512)

Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Additional requirements for some preparers

Unless you are an attorney, Certified Public Accountant, Enrolled Agent, Enrolled Retirement Plan Agent, Enrolled Actuary or Registered Tax Return Preparer, you may need to take a competency test by Dec. 31, 2013 to retain your PTIN after 2013. To view whether you have a test requirement, log into your online account at www.IRS.gov/ptin and select "View Next Steps and Outstanding Requirements" from the Main Menu. If you do have a test requirement, you must also obtain 15 hours of continuing education each calendar year from IRS approved providers.

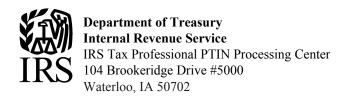
Enrolled Retirement Plan Agents and Enrolled Actuaries who prepare Form 1040 series returns also have a testing requirement. View your "Next Steps" from the Main Menu as described above.

### **Keep your PTIN information current**

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin. You can also update your PTIN account by calling the PTIN Information Line.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/ptin.



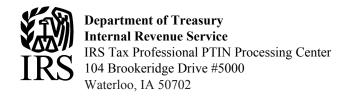
Letter	4763
Date	November 03, 2012
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT



**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ PTIN: P00405019 File Number: 182512 Expires: December 31, 2013



Letter	4763
Date	November 12, 2013
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19931 SWEETGUM CIR APT 23 GERMANTOWN, MARYLAND 20874

Dear Tax Professional,

We've accepted your 2014 renewal for your Preparer Tax Identification Number (PTIN)

Your 2014 PTIN is P00405019 (File Number: 182512)

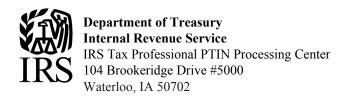
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### **Keep your PTIN information current**

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	November 12, 2013
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT



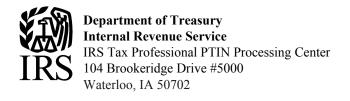
**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

**PTIN:** P00405019 **File Number:** 182512

Expiration Date: December 31, 2014



Letter	4763
Date	November 10, 2014
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TEXAS 78660

Dear Tax Professional,

### We've accepted your 2015 renewal for your Preparer Tax Identification Number (PTIN)

### Your 2015 PTIN is P00405019

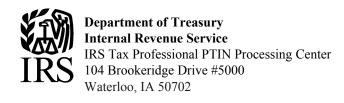
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Keep your PTIN information current

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	November 10, 2014
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

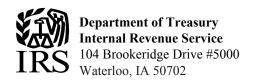


**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2015



Letter	1200
Date	November 14, 2014
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TEXAS 78660

Dear Tax Professional,

Congratulations! We are pleased to provide your 2015 Annual Filing Season Program – Record of Completion.

This document will remain in your PTIN account mailbox if you need future copies.

### 2015

ACTIVE YEAR

### ANNUAL FILING SEASON PROGRAM RECORD OF COMPLETION

### BETTINA VONSCHWEINITZ

has participated in and completed the necessary IRS continuing education requirements related to Form 1040 series federal tax return issues, ethics, and other federal tax law for the 2015

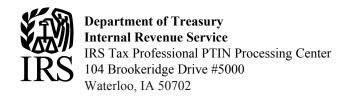
Annual Filing Season Program.





01/01/2015 Effective Date Caus a Cun Carol A. Campbell

Director, IRS Return Preparer Office



Letter	4763
Date	November 04, 2015
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TEXAS 78660

Dear Tax Professional,

We've accepted your 2016 renewal for your Preparer Tax Identification Number (PTIN)

### Your 2016 PTIN is P00405019

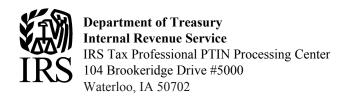
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### **Keep your PTIN information current**

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	November 04, 2015
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

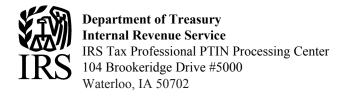


**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2016



Letter	4763
Date	November 10, 2016
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TX 78660

Dear Tax Professional,

We've accepted your 2017 renewal for your Preparer Tax Identification Number (PTIN)

### Your 2017 PTIN is P00405019

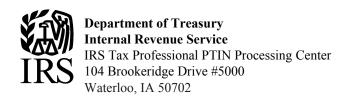
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Keep your PTIN information current

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	November 10, 2016
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

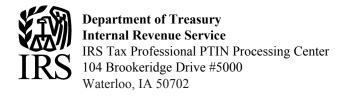


**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2017



Letter	4763
Date	November 10, 2016
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TX 78660

Dear Tax Professional,

We've accepted your 2017 renewal for your Preparer Tax Identification Number (PTIN)

### Your 2017 PTIN is P00405019

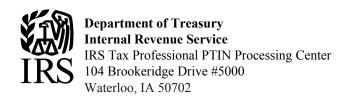
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Keep your PTIN information current

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	November 10, 2016
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

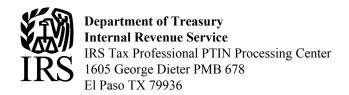


**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2017



Letter	4763
Date	October 16, 2018
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TX 78660

Dear Tax Professional,

### We've accepted your 2019 renewal for your Preparer Tax Identification Number (PTIN)

### Your 2019 PTIN is P00405019

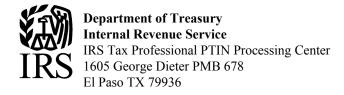
Thank you for renewing your PTIN. We appreciate you working with us to ensure effective tax administration as the tax professional industry is an important part of the U.S. tax system. Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

### Keep your PTIN information current

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

### **Additional Information**

For more information about IRS requirements for tax return preparers, please visit www.IRS.gov/taxpros.



Letter	4763
Date	October 16, 2018
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a m - 5 p m CT



### **Department of Treasury Internal Revenue Service**

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2019

IRS Tax Professional PTIN Information Line

Primary Toll-Free: 877-613-7846

TTY: 877-613-3686

International Callers: 1-915-342-5655

### **Application Summary**

Application: 2020 Renewal

Application Date: 12/02/2019 (mm/dd/yyyy)

### **Personal Information**

First Name: Bettina

Last Name: vonschweinitz

Birthdate: xx/xx/xxxx (mm/dd/yyyy)

Social Security Number: \*\*\*\*\*\*\*\*

### **Contact Information**

Personal Mailing Address

Address: 19117 Ganton Court

PFLUGERVILLE, TX

78660

US

Phone Number: xxxxxxxxxx

E-mail Address: tinavon86@gmail.com

**Business Address** 

Address: 19117 Ganton Court

PFLUGERVILLE, TX

78660

US

Phone Number: xxxxxxxxxx

### **Business Information**

12/2/19, 9:33 AM Page 1 of 2

Are you self-employed or an owner or No partner or officer of a tax preparation business? If yes, provide the numbers below as applicable.

### **Felony Information**

Have you been convicted of a felony No in the last 10 years?

### Tax Compliance

Yes

Are you current with your federal individual and business taxes including any corporate and employment tax obligations?

### Data Security Responsibilities

Check the box to confirm you are

Yes

aware of this responsibility.

### **Professional Credentials**

Credential: Enrolled Agent

Jurisdiction: United States

Number: 00098514-EA

Expiration Date: 03/31/2017 (mm/dd/yyyy)

12/2/19, 9:33 AM Page 2 of 2

Department of Treasury Internal Revenue Service IRS Tax Professional PTIN Processing Center 1605 George Dieter PMB 678 El Paso TX 79936

Letter	LTR 4764
Date	November 02, 2020
To contact us	Phone 1-877-613-7846 TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TX 78660

Dear Tax Professional,

We accepted your 2021 renewal for your preparer tax identification number (PTIN).

Your PTIN is P00405019. Your PTIN is effective for the 2021 calendar year.

Use your PTIN on any tax return or claim for a refund you sign as a paid tax return preparer.

We appreciate you working with us to ensure effective tax administration. The tax professional industry is an important part of the U.S. tax system.

### **Keep your PTIN information current**

You must renew your PTIN by December 31 each year. The annual renewal period begins approximately October 16 and ends on December 31. Update your PTIN account any time your information changes by logging into your account at www.IRS.gov/ptin.

The PTIN fee is non-refundable.

### **Additional Information**

For the latest information for tax return preparers, please subscribe to IRS e-News for Tax Professionals.

- Visit www.IRS.gov
- Select News
- Select e-News Subscriptions
- Select e-News for Tax Professionals
- Select Subscribe, then enter your email address and select Submit

You can also find helpful information at www.IRS.gov/taxpros.

Department of Treasury Internal Revenue Service IRS Tax Professional PTIN Processing Center 1605 George Dieter PMB 678 El Paso TX 79936 
 Letter
 LTR 4764

 Date
 November 02, 2020

 To contact us
 Phone 1-877-613-7846

 TTY 1-877-613-3686
 8 a.m.- 5 p.m. CT

**Department of Treasury Internal Revenue Service** 

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019 Effective Year: 2021



### Department of the Treasury Internal Revenue Service Tax Professional PTIN Processing Center

PO Box 380638 San Antonio, TX 78268

BETTINA VONSCHWEINITZ 19117 GANTON COURT PFLUGERVILLE, TX 78660 Date:
 November 19, 2021
 contact numbers:
 Domestic: 877-613-7846
 International: +1-915-342-5655
 TTY: 877-613-3686
 Hours:
 8 a.m. to 5 p.m. CT

Dear Bettina Vonschweinitz:

Why we're contacting you

We accepted your renewal application for your preparer tax identification number (PTIN). Your PTIN is P00405019.

What you need to know

Your PTIN is effective for the 2022 calendar year only. Use your PTIN on any U.S. tax return or claim for refund you prepare, or substantially help to prepare, for compensation.

You must renew your PTIN by December 31 each year. The annual renewal period begins around October 16 and ends on December 31. **Keep your PTIN information current** by updating your PTIN account any time your information changes. Simply login to your account at www.irs.gov/ptin to update your information quickly. The **PTIN fee is non-refundable.** 

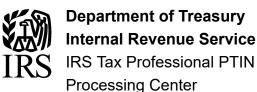
### Where you can go for more information

- · Find helpful information about the PTIN program at www.irs.gov/taxpros.
- Find tax forms and publications by visiting www.irs.gov/forms or calling 800-TAX-FORM (800-829-3676).
- Subscribe to IRS e-News for Tax Professionals for the latest information for tax return preparers by visiting www.irs.gov and following the steps below.
  - 1. Select "News"
  - 2. Select "e-News Subscriptions"
  - 3. Select "e-News for Tax Professionals"
  - 4. Select "Subscribe"
  - 5. Enter your email address and select submit

A wallet sized PTIN card with your information is enclosed for quick reference. We appreciate you working with us to ensure effective tax administration. The tax professional industry is an important part of the U.S. tax system. Keep this letter for your records.

If you have questions, you can call the contact number shown at the top of this letter.

Sincerely, Return Preparer Office 10/28/22, 3:56 PM PTIN Print - PTIN



IRS Tax Professional PTIN Processing Center PO Box 380638 San Antonio TX 78268

Letter	LTR 4764
Date	October 28, 2022
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

BETTINA VONSCHWEINITZ 14320 TANDEM BLVD APT 5405 AUSTIN, TX 78728

Dear BETTINA VONSCHWEINITZ:

### Why we're contacting you

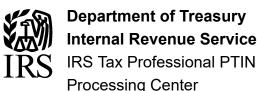
We accepted your renewal application for your preparer tax identification number (PTIN). Your PTIN is P00405019.

### What you need to know

Your PTIN is **effective for the 2023 calendar year only.** Use your PTIN on any U.S. tax return or claim for refund you prepare, or substantially help to prepare, for compensation.

You must renew your PTIN by December 31 each year. The annual renewal period begins around October 16 and ends on December 31. **Keep your PTIN information current** by updating your PTIN any time your information changes. Simply by logging into your account at <a href="www.irs.gov/ptin">www.irs.gov/ptin</a> to update your information quickly. The **PTIN fee is non-refundable.** 

10/28/22, 3:56 PM PTIN Print - PTIN



IRS Tax Professional PTIN Processing Center PO Box 380638 San Antonio TX 78268

Letter	LTR 4764
Date	October 28, 2022
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT

### Where you can find more information

For the latest information for tax return preparers, please subscribe to IRS e-News for Tax Professionals.

- Find helpful information about the PTIN program at <u>www.irs.gov/taxpros</u>.
- Find tax forms and publications by visiting <a href="www.irs.gov/forms">www.irs.gov/forms</a> or calling 800-TAX-FORM (800-829-3676).
- Subscribe to IRS e-News for Tax Professionals for the latest information for tax return preparers by visiting <a href="www.irs.gov">www.irs.gov</a> and following the steps below.
  - 1. Select "News"
  - 2. Select "e-News Subscriptions"
  - 3. Select "e-News for Tax Professionals"
  - 4. Select "Subscribe"
  - 5. Enter your email address and select submit

A wallet sized PTIN card with your information is enclosed for quick reference. We appreciate you working with us to ensure effective tax administration. The tax professional industry is an important part of the U.S. tax system. Keep this letter for your records.

If you have questions, you can call the contact number shown at the top of this letter.

Sincerely, Return Preparer Office 10/28/22, 3:56 PM PTIN Print - PTIN



### **Department of Treasury Internal Revenue Service**

IRS Tax Professional PTIN Processing Center PO Box 380638 San Antonio TX 78268

Letter	LTR 4764
Date	October 28, 2022
To contact us	Phone 1-877-613-7846
	TTY 1-877-613-3686
	8 a.m 5 p.m. CT



### Department of Treasury Internal Revenue Service

IRS Tax Professional PTIN Processing Center

Name: BETTINA VONSCHWEINITZ

PTIN: P00405019
Effective Year: 2023

### IRS EA

5

2010 to 2017

### Special Enrollment Examination Score Report

Candidate Name: BETTINA VONSCHWEINITZ

Candidate Number: P00405019

Part: Special Enrollment Examination Part 1 - Individuals

Test Date: August 19, 2010

Test Center: 0084

Congratulations! This report documents that you were successful in achieving the passing score on the Special Enrollment Examination Part 1 - Individuals. You have passed this part of the examination.

As noted in the candidate bulletin, which can be found on our website, passing candidates will not be provided with their scaled score. The passing score range is from 105 to 130.

Upon passing all parts of the examination you will be eligible to apply for enrollment to practice before the Internal Revenue Service. You will have to complete Form 23, Application for Enrollment Before the Internal Revenue Service and file it with the Internal Revenue Service. The form can be found at www.irs.gov and click on "Tax Professionals" and then click on "Enrolled Agents". Please save this score report. When mailing in Form 23, you should attach a check for \$125 (payable to the Internal Revenue Service) and a copy of this score report, along with passing score reports for all other parts of the examination. You have one year to apply for enrollment once you have passed all parts of the examination. Upon receipt, the Internal Revenue Service will send you a confirmation that Form 23 has been received.

If you have any questions about the examination, please visit www.prometric.com/IRS. If you have any questions about enrollment, please refer to www.irs.gov. Click on 'Tax Professions' and then select 'Enrolled Agents'.



### Special Enrollment Examination Score Report

Candidate Name: BETTINA VONSCHWEINITZ

Candidate Number: P00405019

Part: Special Enrollment Examination Part 3 - Representation, Practice and

**Procedures** 

Test Date: November 2, 2010

Test Center: 0084

Congratulations! This report documents that you were successful in achieving the passing score on the Special Enrollment Examination Part 3 - Representation, Practice and Procedures. You have passed this part of the examination.

As noted in the candidate bulletin, which can be found on our website, passing candidates will not be provided with their scaled score. The passing score range is from 105 to 130.

Upon passing all parts of the examination you will be eligible to apply for enrollment to practice before the Internal Revenue Service. You will have to complete Form 23, Application for Enrollment Before the Internal Revenue Service and file it with the Internal Revenue Service. The form can be found at www.irs.gov and click on "Tax Professionals" and then click on "Enrolled Agents". Please save this score report. When mailing in Form 23, you should attach a check for \$125 (payable to the Internal Revenue Service) and a copy of this score report, along with passing score reports for all other parts of the examination. You have one year to apply for enrollment once you have passed all parts of the examination. Upon receipt, the Internal Revenue Service will send you a confirmation that Form 23 has been received.

If you have any questions about the examination, please visit www.prometric.com/IRS. If you have any questions about enrollment, please refer to www.irs.gov. Click on 'Tax Professions' and then select 'Enrolled Agents'.

### Special Enrollment Examination Score Report

Candidate Name: BETTINA VONSCHWEINITZ

Candidate Number: P00405019

Part: Special Enrollment Examination Part 2 - Businesses

Test Date: December 2, 2010

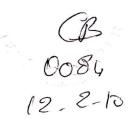
Test Center: 0084

Congratulations! This report documents that you were successful in achieving the passing score on the Special Enrollment Examination Part 2 - Businesses. You have passed this part of the examination.

As noted in the candidate bulletin, which can be found on our website, passing candidates will not be provided with their scaled score. The passing score range is from 105 to 130.

Upon passing all parts of the examination you will be eligible to apply for enrollment to practice before the Internal Revenue Service. You will have to complete Form 23, Application for Enrollment Before the Internal Revenue Service and file it with the Internal Revenue Service. The form can be found at www.irs.gov and click on "Tax Professionals" and then click on "Enrolled Agents". Please save this score report. When mailing in Form 23, you should attach a check for \$125 (payable to the Internal Revenue Service) and a copy of this score report, along with passing score reports for all other parts of the examination. You have one year to apply for enrollment once you have passed all parts of the examination. Upon receipt, the Internal Revenue Service will send you a confirmation that Form 23 has been received.

If you have any questions about the examination, please visit www.prometric.com/IRS. If you have any questions about enrollment, please refer to www.irs.gov. Click on 'Tax Professions' and then select 'Enrolled Agents'.



Department of the Treasury Internal Revenue Service

Practice Before the Internal Revenue **Enrollment to** Service

00098514-EA

Department of the Treasury

This evidences that

**BETTINA VONSCHWEINITZ** 

is enrolled to practice before the internal Revenue Service under 31 Code of Federal Regulations Part 10 (Treasury Department Circular No. 230)

Limitations on Enrolled Agents, if any

ISSUE DATE

02-04-2011 EXPIRATION DATE

03-31-2014

Form 24-A(c) (Rev. 8-2009) Catalog Number 33452Y

19931 SWEETGUM CIRCLE, APT. 23

GERMANTOWN, MD 20874

BETTINA VONSCHWEINITZ

www.irs.gov

Department of the Treasury - Internal Revenue Service

Department of the Treasury - Internal Revenue Service

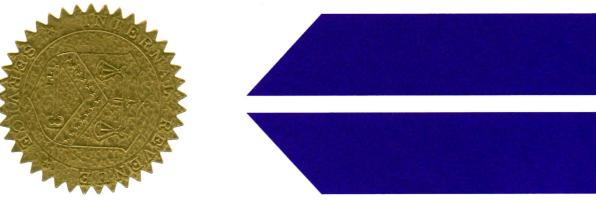
Enrolled Agents are required to follow the rules of Circular 230, including the requirements of Continuing Professional Education.

Signature of Enrolled Agent

Karen L. Hawkins

Director, Office of Professional Responsibility

orm **24-A(C)** (Rev. 8-2009) Catalog No. 33452Y



# Certificate of Enrollment

This is To Certify That

## **BETTINA VONSCHWEINITZ**

Before The To Practice Is Enrolled

### INTERNAL REVENUE SERVICE



Day Of **Enrolled Agent** Effective The 4th February, 2011

Number 00098514-EA

Department of the Treasury Internal Revenue Service

Office of Professional Responsibility

Director,

### Internal Revenue Service

Office of Practitioner Enrollment P.O. Box 33968 Detroit, MI 48232

### Department of the Treasury

Date: February 4, 2011

Bettina VonSchweinitz 19931 Sweetgum Circle, Apt. 23 Germantown, MD 20874

### Dear Bettina VonSchweinitz:

We have approved your application for Enrolled Agent status. Your Enrollment card and certificate are enclosed. Please write your enrollment number on any correspondence you send to our office.

To maintain active enrollment status, you are required to take Continuing Professional Education and apply for renewal when it is due. For additional information, see Treasury Department Circular No. 230, section 10.6.

It is important that you notify us if your mailing address changes so we can update our records.

### If you have any questions:

- To obtain a copy of Treasury Department Circular No. 230, visit <u>www.irs.gov</u> or call 1-800-TAXFORM to request a copy.
- Call us at 1-313-234-1280.
- Fax us at 313-234-1622.
- E-mail us at EPP@irs.gov.
- Write to us at the address shown on this letter.

Sincerely,

Karen L. Hawkins

Director, Office of Professional

Responsibility

Enclosure:

Enrollment Card
Certificate of Enrollment



### Department of the Treasury Internal Revenue Service

Office of Practitioner Enrollment P.O. Box 33968 Detroit, MI 48232 Fax (313) 234-1622



Date: 01/10/2014

BETTINA VONSCHWEINITZ 19931 SWEETGUM CIRCLE 23 GERMANTOWN, MD 20874

### Dear Agent:

We have approved your application for renewal of Enrolled Agent status. Your new Enrollment card is below. Please write your enrollment number on any correspondence you send to our office. To maintain active enrollment status, you are required to take Continuing Professional Education, apply for renewal when it is due, and maintain a current Preparer Tax Identification Number (PTIN).

For additional information, visit www.irs.gov/PTIN and see section 10.6 of Treasury Department Circular No. 230, available at www.irs.gov/taxpros.

It is important that you notify us if your mailing address changes so we can update our records. If you have any questions:

- Call us at (313) 234-1280.
- Write to us at the address shown on this letter.

Sincerely,

Carol A. Campbell, Director Return Preparer Office

Care a len-

See reverse side for privacy and information notice

Form 24-A (Rev. 8-2012)

Catalog Number 33452Y

www.irs.gov

Department of the Treasury - Internal Revenue Service

### Continuing Education (CE) Requirements

Annual CE Cycle: January through December

See Circular 230: Section 10.6 at www.irs.gov

Enrollment to Practice Before the Internal Revenue Service

00098514-EA



This evidences that

BETTINA VONSCHWEINITZ

is enrolled to practice before the Internal Revenue Service under 31 Code of Federal Regulations Part 10 (Treasury Department Circular No. 230)

ISSUE DATE

04/01/2014

EX5/3/31/2017

Limitations on Practice, if any

### **Public Information**

Your status as an Enrolled Agent and certain information on your application is made available to the general public as required by the Freedom of Information Act. This includes your name, business mailing address, work telephone number, and e-mail address. If you wish to update any of this information, please send a signed written request to the address or fax in the heading of this letter. Include your enrollment number, name, prior information, new information, and social security number or individual tax identification number.

Form 24-A (Rev. 8-2012)

Catalog Number 33452Y

www.irs.gov

Department of the Treasury - Internal Revenue Service

Agents are required to follow the rules of Circular 230, including the requirements for Continuing Professional Education.

Signature of Enrolled

Carol A. Campbell Director, Return Preparer Office

Form 24-A (Rev. 8-2012)

Catalog Number 33452Y



### **Enrolled Agents Topics**

- IRB
- Enrolled Agents Home

### Maintain Your Enrolled Agent Status

### **Enrolled Agent Renewal**

- Renewal cycle: every 3 years based on last digit of SSN. The November 1, 2016 January 31, 2017 renewal cycle is for SSNs ending in 3, 4 or 5 (view <u>Circular 230</u> Section 10.6(d) for details)
- Renew online at <u>Pay.gov</u> (put 8554 in the search box)
- Renew on paper using Form 8554

### **PTIN Renewal**

 Renew your preparer tax identification number (PTIN) between October 16 – December 31 each year at <a href="https://www.irs.gov/ptin">www.irs.gov/ptin</a>

### **Continuing Education Requirements**

- Obtain 72 hours every three years (based on your renewal cycle)
- Obtain a minimum of 16 hours per year (2 of which must be on ethics)
- Use an IRS <u>approved continuing education provider</u>
- · Review the enrolled agent CE credit chart
- · Review the Frequently Asked Questions

### **Keep Your Contact Information Current**

If your contact information has changed since the time of your last renewal, please notify us by fax or mail your address change to:

Office of Practitioner Enrollment P.O. Box 33968 Detroit, MI, 48232

OR

Fax: (855) 889-7959

Please include your name, prior contact information, new contact information, social security number or tax identification number, and the date.

Page Last Reviewed or Updated: 29-Jul-2016



### **Enrolled Agent News**

### **IRS to Conduct EA CE Audits**

Beginning in May 2016, the IRS will mail letters to a random sample of EAs with SSNs ending in 0, 1, 2, or 3 requesting copies of their continuing education (CE) certificates of completion for the past three years.

Recipients of the letters will be asked to mail or fax the documents within 30 days.

### IRS to Inactivate/Terminate EAs Who Haven't Renewed

Beginning in June 2016, the Internal Revenue Service will send letters to EAs whose enrollment status is being inactivated or terminated because of failure to renew.

EAs with SSNs ending in 0, 1, 2, or 3, who did not renew for the 2016 cycle will have their enrollment placed in inactive status.

EAs with SSNs ending in 0, 1, 2, or 3, who have not renewed for the previous two cycles will have their enrollment placed in terminated status.

If you have questions about your enrollment status, please contact the Office of Enrollment at 855-472-5540.

### **Annual Enrollment Renewal Application Period for EAs**

The 2016 Enrollment Renewal Application Period is open from November 1, 2015 through January 31, 2016. Per <u>U.S. Treasury Department Circular No. 230 (Rev. 6-2014)</u>, you are required to renew your EA status during this time frame if your SSN ends in 0, 1, 2, or 3. **Without renewal your current enrollment will expire on March 31, 2016**.

You may submit your enrollment renewal application and payment directly online through Pay.gov.

To renew you must:

- 1. Have an active preparer tax identification number (PTIN).
- 2. Complete a minimum of 16 hours CE each year of your enrollment cycle for a total 72 hours. In addition, 2 hours of ethics, or professional conduct must be completed during each enrollment year. EXCEPTION: If this is your first renewal, you must complete 2 hours of CE for each month of your enrollment, including 2 hours of ethics, or professional conduct each year.
- 3. Pay the \$30 non-refundable renewal fee. This fee applies regardless of your enrollment status.

Use these tips to ensure your application is processed as quickly as possible:

- 1. Do not submit your application prior to November 1, 2015.
- 2. Fill in the CE table in Part 1 completely.
- 3. Sign, and date your form in Part 3.

Please allow 90 days for processing before calling 855-472-5540 to check on the status of your application.

### NY

### TY2010 to TY2013



### New York State Department of Taxation and Finance

### **Tax Preparer Certificate of Registration**

New York State Tax Preparer Registration Identification Number (NYTPRIN)

10770255

(Use this number on all required documents)



**VALID** 

01/01/2011 - 12/31/2011

Issued To:

BETTINA VONSCHWEINITZ
GERMANTOWN, MD 20874-3786
US

Type of Registration: Refund Anticipation Loan/Check Facilitator

### Nontransferable

This certificate must be produced upon request.

Fraudulent or other improper use of this certificate will cause it to be revoked.

The issuance of a Certificate of Registration is not, and must not be advertised as, an endorsement by New York State of the preparer, the preparer's qualifications or any services that the preparer may provide.

Confirmation number: TPRG1102130098775

### Your registration number is below:

■ Print this page, you'll need the information

### If you registered as a tax return preparer, you must:

- Sign a New York State tax return or report when required and include your registration number on any return or report that requires your signature
- Re-register annually
- Pay the annual registration fee (this only applies to commercial tax return preparers)

Failure to do so may result in financial penalty.

### If you registered as a facilitator, you must:

- Include your name and registration number of the written disclosure statement the law says you must provide to clients. For disclosure statement instructions, see the Refund Anticipation Loans section of Publication 135, Consumer Bill of Rights Regarding Tax Preparers. Download the publication at www.nystax.gov.
- Sign refund anticipation loan or refund check documentation when required
- Re-register annually

Failure to do so may result in financial penalty.

### Not an endorsement

Registration of tax return preparers and facilitators is an important step in consumer protection. However, the issuance of a Certificate of Registration isn't an endorsement by the State; you can't use it to advertise your services or qualifications.

### Contact us about inaccurate information

Is the information below correct? If not, call (518) 457-1929.



New York State Department of Taxation and Finance

### Tax Preparer Certificate of Registration

New York State Tax Preparer Registration Identification Number (NYTPRIN)

10770255

(Use this number on all required documents)



VALID

01/01/2012 - 12/31/2012

Issued To:

BETTINA VONSCHWEINITZ

**GERMANTOWN, MD 20874-3786** 

US

Type of Registration: Refund Anticipation Loan/ Check Facilitator

### Nontransferable

This certificate must be produced upon request.

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Confirmation number: TPRG1111280732845



### Tax Preparer & Facilitator Enrollment

Registration information	
Applicant ID: XXX-XX-3605	Applicant name: BETTINA VONSCHWEINITZ
Registration period: 01/01/2013 - 12/31/2013	Registration number: 10770255
Type of registration: FACILITATOR	Registration fee (\$):
Applicant details	
Electronic filer identification number (EFIN):	
Federal preparer taxpayer identification number (PTIN): P00405019	Year of birth: 1959
Personal phone number: (301)916-4696	Extension:
Personal email address: TINAVON@PEOPLEPC.COM	
Personal home address: 19931 SWEETGUM CIR APT 23 GERMANTOWN, MD 20874-3786 US	Personal mailing address: 19931 SWEETGUM CIR APT 23 GERMANTOWN, MD 20874-3786 US
Application details	
Are you currently licensed as a Certified Public Accountant (CPA) or Public Acc	countant (PA)?
Are you an attorney who is currently licensed to practice law?  ☐ Yes ✓ No	
Are you currently an Internal Revenue Service (IRS) enrolled agent?    V  Yes   No	
Do you, as an employee of a CPA, PA, enrolled agent, or law firm, prepare to that firm?  Yes V No	ex returns under the supervision of an attorney, enrolled agent, CPA, or PA in
Do you expect to prepare at least one New York State return for compensation Yes No	on in 2013?
Do you facilitate refund anticipation loans (RALs)?  ☐ Yes ✓ No	
RAL Bank routing number:	Financial institution that issued the RAL:
Do you facilitate refund anticipation checks (RACs)?  ✓ Yes  No	
RAC Bank routing number: 101089742	Financial institution that issued the RAC: H & R BLOCK BANK
Did you prepare 10 or more New York State returns for compensation in cale  ☐ Yes ☑ No	endar year 2012?
Do you expect to prepare 10 or more New York State returns for compensation Yes  No	on in calendar year 2013?

Are you an employee of a business that prepares tax documents?  Yes No							
Are you self-employed and have a separate business address that is different to Yes   No	than above?						
Are you self employed and have a federal employer identification number (FEII Yes V No	N)?						
Employer filing details							
Federal employer identification number (FEIN):	Electronic filer identification number (EFIN):						
Legal name: H&R BLOCK	DBA or trade name:						
Work phone number: (301)916-5469	Extension:						
Work e-mail address:							
Employer physical address: 19734 GERMANTOWN RD BLDG 7 GERMANTOWN, MD 20874 US	Employer mailing address: 19734 GERMANTOWN RD BLDG 7 GERMANTOWN, MD 20874 US						
Education details							
Highest Education Level:	Do you have a professional certificate in Taxation?  — Yes — No						
College credits completed in accounting:	Hours of tax preparation training in the past 12 months:						
Return preparation details							
What type(s) of New York State returns do you prepare?							
Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility  Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business:  Alcoholic beverages:  Cigarette and/or tobacco products:	tax (MCTMT):						
Payment details							
Bank routing number:	Payment method:						
Bank name:	Payment for:						
Bank account number:	Payment date:						
Account type:	Amount due (\$):						

### Transaction details

Confirmation number:

TPRG1211221110459

Submitted by:

BETTINA VONSCHWEINITZ

Transaction date/time:

11/22/2012 06:00 PM

### Your registration number is below:

Print this page, you'll need the information

### If you registered as a tax return preparer, you must:

- Sign a New York State tax return or report when required and include your registration number on any return or report that requires
  your signature
- Re-register annually
- Pay the annual registration fee (this only applies to commercial tax return preparers)

Failure to do so may result in financial penalty.

### If you registered as a facilitator, you must:

- Include your name and registration number of the written disclosure statement the law says you must provide to clients. For disclosure statement instructions, see the Refund Anticipation Loans section of Publication 135, Consumer Bill of Rights Regarding Tax Preparers. Download the publication at www.nystax.gov.
- Sign refund anticipation loan or refund check documentation when required
- Re-register annually

Failure to do so may result in financial penalty.

### Not an endorsement

Registration of tax return preparers and facilitators is an important step in consumer protection. However, the issuance of a Certificate of Registration isn't an endorsement by the State; you can't use it to advertise your services or qualifications.

### **Contact us about inaccurate information**

Is the information below correct? If not, call (518) 457-1929.



New York State Department of Taxation and Finance

### **Tax Preparer Certificate of Registration**

New York State Tax Preparer Registration Identification Number (NYTPRIN)

10770255

(Use this number on all required documents)



**VALID** 

01/01/2013 - 12/31/2013

Issued To:

US

BETTINA VONSCHWEINITZ GERMANTOWN, MD 20874-3786

Type of Registration: Refund Anticipation Loan/Check Facilitator

### **Nontransferable**

This certificate must be produced upon request.

Fraudulent or other improper use of this certificate will cause it to be revoked.

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Confirmation number: TPRG1211221110459



### Tax Preparer & Facilitator Enrollment

Registration information	
Applicant ID: XXX-XX-3605	Applicant name: BETTINA VONSCHWEINITZ
Registration period: 01/01/2014 - 12/31/2014	Registration number: 10770255
Type of registration: FACILITATOR	Registration fee (\$):
Applicant details	
Electronic filer identification number (EFIN):	
Federal preparer taxpayer identification number (PTIN): P00405019	Year of birth: 1959
Personal phone number: (301)916-4696	Extension:
Personal email address: TINAVON@PEOPLEPC.COM	
Personal home address: 19931 SWEETGUM CIR APT 23 GERMANTOWN, MD 20874-3786 US	Personal mailing address: 19931 SWEETGUM CIR APT 23 GERMANTOWN, MD 20874-3786 US
Application details	
Are you currently licensed as a Certified Public Accountant (CPA) or Public Acc	countant (PA)?
Are you an attorney who is currently licensed to practice law?  ☐ Yes ✓ No	
Are you currently an Internal Revenue Service (IRS) enrolled agent?  ✓ Yes   No	
Do you, as an employee of a CPA, PA, enrolled agent, or law firm, prepare tast that firm?  Yes  No	x returns under the supervision of an attorney, enrolled agent, CPA, or PA in
Do you expect to prepare at least one New York State return for compensatio Yes No	n in 2014?
Do you facilitate refund anticipation loans (RALs)?  ☐ Yes ☑ No	
RAL Bank routing number:	Financial institution that issued the RAL:
Do you facilitate refund anticipation checks (RACs)?  ✓ Yes   No	
RAC Bank routing number: 101089742	Financial institution that issued the RAC: H & R BLOCK BANK
Did you prepare 10 or more New York State returns for compensation in caler  ☐ Yes ☑ No	ndar year 2013?
Do you expect to prepare 10 or more New York State returns for compensation Yes V No	on in calendar year 2014?

Are you an employee of a business that prepares tax documents?	
Are you self-employed and have a separate business address that is different  Yes  No	than above?
Are you self employed and have a federal employer identification number (FEI Yes V No	N)?
Employer filing details	
Federal employer identification number (FEIN):	Electronic filer identification number (EFIN):
Legal name: H&R BLOCK	DBA or trade name:
Work phone number: (301)916-5469	Extension:
Work e-mail address: BETTINA.VONSCHWEINITZ@TAX.HRBLOCK.COM	
Employer physical address: 19734 GERMANTOWN RD GERMANTOWN, MD 20874 US	Employer mailing address: 19734 GERMANTOWN RD GERMANTOWN, MD 20874 US
Education details	
Highest Education Level:	Do you have more than three years experience in the preparation of New York State returns?
College credits completed in accounting:	
College credits completed in accounting:	Hours of tax preparation training in the past 12 months:
College credits completed in accounting:  Return preparation details	
Return preparation details  What type(s) of New York State returns do you prepare?	
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):	
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility  Highway use and/or International Fuel Tax Agreement (IFTA):	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility	Hours of tax preparation training in the past 12 months:
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Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility  Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business:  Alcoholic beverages:	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility  Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business:  Alcoholic beverages:  Cigarette and/or tobacco products:	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility  Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business:  Alcoholic beverages:  Cigarette and/or tobacco products:  Payment details	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business:  Alcoholic beverages:  Cigarette and/or tobacco products:  Payment details  Bank routing number:	Hours of tax preparation training in the past 12 months:
Return preparation details  What type(s) of New York State returns do you prepare?  Personal income (includes estates, partnerships, and trusts):  Corporation:  Sales and use:  Withholding and/or Metropolitan commuter transportation mobility Highway use and/or International Fuel Tax Agreement (IFTA):  Motor fuel and/or petroleum business: Alcoholic beverages: Cigarette and/or tobacco products:  Payment details  Bank routing number:  Bank name:	Hours of tax preparation training in the past 12 months:

### Transaction details

**Confirmation number:** TPRG1401075363026

Tax professional ID:

Submitted by:

BETTINA VONSCHWEINITZ

Transaction date/time:

01/07/2014 02:29 PM

Tax professional name:

### Your registration number is below:

Print this page, you'll need the information

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Confirmation number: TPRG1401075363026

### AARP



### Tina vonSchweinitz <tinavon86@gmail.com>

Re: TAX AIDE

1 message

Carl Redstone <credstonetx@gmail.com>
To: Tina vonSchweinitz <tinavon86@gmail.com>

Thu, Mar 3, 2016 at 9:10 AM

We still have some unhappy clients but most are appreciative. Very few of our counselors have prior tax experience when they go to training. Those who do are usually the most difficult for us to keep "in scope" with our charter so sometimes tensions arise. That being said you would be most welcome next year.

Our site at the library always has people waiting but if you come in the afternoon say 1:30 to 2:30 you would have a chance to see us in operation (although not viewing any TP documentation or returns) and have a few minutes to talk to some of the folks who have been working with the program for years. Just identify yourself to me. I work at the table in the middle of the room, right in front of the doors to the hall.

On Wed, Mar 2, 2016 at 4:17 PM, Tina vonSchweinitz <tinavon86@gmail.com> wrote:

Glad that Bette gave you my name. I was asking her about the AARP tax aid that is at the Pflugerville Library on Fridays.

I stopped by the Pflugerville Library a couple of Fridays ago but there were several people waiting. So I did not stop to talk.

I can stop by again.

But, are you talking about the Pflugerville Library location or where? And what time is best?

Driving to Georgetown for training session during the day is no problem for me, even next year.

Just to give you some of my background. I have been doing taxes for H&R Block since 2004. Also, I am currently an Enrolled Agent. But I strongly believe that H&R Block is pricing themselves out of the market for the average taxpayer. Clients are happy with my services but then are unhappy with the high preparation costs. To much of an emotional roller coaster. So I would rather volunteer my services and have happy clients all around.

Take care, Tina
Tina von Schweinitz
512-990-3557
tinavon86@gmail.com

On Wed, Mar 2, 2016 at 9:19 AM, Carl Redstone <credstonetx@gmail.com> wrote:

Bette, the mystery book club librarian passed your name along to us. All of us must complete our required classroom and exercises before the sites open in late Jan or early Feb. The on line training for practice and qualifying is then not monitored by instructors or tutors.

Why don't you stop by some Friday afternoon this month -- usually our slowest period -- and we can chat and you can talk to some of the other volunteers? Our district administrator will contact you next December about training. We are changing software after 15 years so there probably will be more mandatory sessions held in Georgetown during the day.

Arlene Redstone, Local Coordinator, Pflugerville. credstonetx@gmail,com

Arlene & Carl Redstone credstonetx@gmail,com



Tina vonSchweinitz <tinavon86@gmail.com>

### Re: AARP TaxAide

1 message

Neal L. Baumwart <nbaumwart@hotmail.com> To: Tina vonSchweinitz <tinavon86@gmail.com> Mon, Sep 10, 2018 at 10:36 AM

We have several weeks, even a couple of months before you have to make a decision. Training this year will be Jan. 2,3,4,7,8,10 and 11.

Please let me know how your mother is doing and your plans, maybe by the end of October, or early Nov. There is plenty of time.

Neal

From: Tina vonSchweinitz <tinavon86@gmail.com>

Sent: Monday, September 10, 2018 10:30 AM

To: nbaumwart@hotmail.com

Cc: Tina von

Subject: Re: AARP TaxAide

Hi, thank you for thinking of me.

I am still taking care of my Mother. Right now she is going through a bad spell. Later this week she is going into the Heart Hospital for a new Aortic valve.

If this works, she should do better. And if it works really well, she should be able to take care of herself for extended periods of time. Then I might be able to leave the home and may be get back into doing taxes.

We should know in the next week or two, how well this new valve will help her.

So, please give me a couple of more weeks, and I will better be able to determine if I can join your team.

Thank you, Tina

On Mon, Sep 10, 2018 at 10:11 AM Neal L. Baumwart <a href="mailto:nbaumwart@hotmail.com">nbaumwart@hotmail.com</a> wrote: Bettina,

Now that summer is mostly behind us, it is time to begin thinking about the upcoming tax season. Last year you indicated you were interested in joining us, but could not, and thought you might be available at a later date. Are you still interested in volunteering with AARP TaxAide?

If I do not hear from you within the next week, either Charles Friedman or I will contact you with information about the upcoming training and to answer any questions you may have.

I am looking forward to visiting with you.

Neal L Baumwart

Coordinator

TX2, District 3 AARP TaxAide

512-938-3174



Tina vonSchweinitz <tinavon86@gmail.com>

### Re: TaxAide Volunteer for Dec2019/Jan2020

1 message

Tina vonSchweinitz <tinavon86@gmail.com>

Mon, Dec 2, 2019 at 5:08 PM

To: Charles Friedman <chas7488@yahoo.com>

Cc: "Neal L. Baumwart" <nbaumwart@hotmail.com>, maciew1944@yahoo.com, Tina von <tinavon86@gmail.com>

Thank you, will put on my calendar, and will be at Georgetown at 8:45 on 9 January Tina

On Mon. Dec 2, 2019 at 4:54 PM Charles Friedman <chas7488@vahoo.com> wrote:

My notes from our recent training committee show that your training, as a new counselor, will begin on Thursday, January 9 at the Georgetown Library. Please arrive by 8:45 to check in. We will need to see your driver's license for identification. The classes will continue each day until the morning of Friday, January, 17. That afternoon, instructors will be available for questions which new counselors may have, and that will occur on Tuesday, January 21, as well. The classes will run from 9 AM to 4 PM, with the noon hour for lunch. Several fast food restaurants are in the vicinity. The instructors will assign homework for each evening. If you have a laptop computer, you can use your own computer during training. If you do not have a laptop computer, then you can borrow an IRS computer from us.

Prior to the date that training begins, we will send you a link to a pair of short, 15-minute videos. These videos will help to orient you to this training process.

Welcome aboard, Tina! Thank you for volunteering.

### Charlie Friedman

On Monday, December 2, 2019, 02:56:45 PM CST, Tina vonSchweinitz <tinavon86@gmail.com> wrote:

Hi, this is Tina

I am new to your group of Tax Preparer's.

Is there a schedule yet in January for the training?

I am trying to keep January open, but I do have to schedule a few doctor appointments.

Thanks, Tina

On Mon, Jul 29, 2019 at 9:30 AM Neal L. Baumwart <a href="mailto:nbaumwart@hotmail.com">nbaumwart@hotmail.com</a>> wrote:

Sorry to hear about your mother. Thank you for keeping me informed. We are just now developing plans for this year's training.

Someone will be in touch with you with information about training in the near future.

Neal

From: Tina vonSchweinitz <tinavon86@gmail.com>

Sent: Sunday, July 28, 2019 5:28 PM

To: Neal L. Baumwart < nbaumwart@hotmail.com>

Cc: Tina von <tinavon86@gmail.com>

Subject: Re: TaxAide Volunteer for Dec2019/Jan2020

Hi, this is Tina,

I am sorry to say that my Mother passed away in June 2019.

By December or January I should be ready to take on new responsibilities.

If you are still interested in allowing me to volunteer, please let me know.

Tina

Tina von Schweinitz 512-968-2319 Pflugerville

On Thu, Nov 15, 2018 at 3:44 PM Neal L. Baumwart <nbaumwart@hotmail.com> wrote:

Tina.

Sorry to hear about your mother. I will put your application on hold, to be contacted next year.

Neal

From: Tina vonSchweinitz <tinavon86@gmail.com>

Sent: Thursday, November 15, 2018 2:27 PM

To: nbaumwart@hotmail.com

Cc: Tina von

Subject: Re: TaxAide Volunteer

Thank you for considering me. I wish I could join you for this tax season.

But Mother's health has not improved and she still needs around the clock care.

Doctor now say that there is not much else they can do.

And that she can be in this state for some time.

We (also the rest of the family) want to care for her at home as long as possible.

But please consider me again next year.

The sitituation may be different.

Take care, Tina

On Thu, Nov 15, 2018 at 11:22 AM Neal Baumwart <nbaumwart@hotmail.com> wrote: Bettina.

I am just checking on how things are going with your mother. Are you still interested in working with us during the upcoming tax season? Training will include the 1st 2 weeks of January. Please let me know, soon, what you would wish to do.

Neal Baumwart TX2 Dist 3 Coordinator 512-938-3174

Form **13615** (October 2018)

Department of the Treasury - Internal Revenue Service

### Volunteer

Standards of Conduct Agreement – VITA/TCE Programs

The mission of the VITA/TCE return preparation programs is to assist eligible taxpayers in satisfying their tax responsibilities by providing **free** tax return preparation. To establish the greatest degree of public trust, volunteers are required to maintain the highest standards of ethical conduct and provide quality service.

**Instructions:** All VITA/TCE volunteers (whether paid or unpaid workers) must pass the Volunteer Standards of Conduct certification, and sign and date Form 13615, Volunteer Standards of Conduct Agreement, prior to working at a VITA/TCE site. In addition, return preparers, quality reviewers, site coordinators, and VITA/TCE tax law instructors must certify in the Intake/Interview & Quality Review and tax law prior to signing this form. This form is not valid until the site coordinator, sponsoring partner, instructor, or IRS contact confirms the volunteer's identity, with photo ID, and signs and dates the form.

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- Not accept payment, solicit donations, or accept refund payments for federal or state tax return preparation from customers.
- Not solicit business from taxpayers you assist or use the knowledge you gained (their information) about them for any direct or indirect personal benefit for you or any other specific individual.
- 4) Not knowingly prepare false returns.
- Not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct deemed to have a negative effect on the VITA/TCE Programs.
- 6) Treat all taxpayers in a professional, courteous, and respectful manner.

Failure to comply with these standards could result in, but is not limited to, the following:

- Your removal from all VITA/TCE Programs;
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- Termination of grant funds from the IRS to your sponsoring partner; and
- Referral of your conduct for potential TIGTA and criminal investigations.

**Taxpayer Impact:** Taxpayer trust in the IRS and the local sponsoring partner organization is jeopardized when ethical standards are not followed. Fraudulent returns that report incorrect income, credits, or deductions can result in many years of interaction with the IRS as the taxpayer tries to pay the additional tax plus interest and penalties. This can result in an extreme burden for the taxpayer as the taxpayer tries to resolve the errors made on his or her return.

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For additional information on the volunteer standards of conduct, please refer to Publication 1084, Site Coordinator Handbook.

**Privacy Act Notice** – The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. Please note: Sponsoring organizations may perform background checks on their volunteers.

### Generated From Link & Learn Taxes

Volunteer:				a										
By signing this form, I decomply with the standard												VIII		
Full name (please print)						Vol	unteer	position(s)		☐ IRS Employee				
Home address (street, city	, state and ZIP code)													
Email address Daytime tele					hone			Sponsoring partner name/site name						
Number of years volunteered (including this year) Volunteer sign					ature				Date					
	(Add th	ne lett	er "P" fo	r all pa	assing test scores	s)								
Standards of Conduct (Required for ALL)			Coordinator Training Basic		Ad	Advanced I		ry International	HSA	Puerto R		oreign tudents		
Federal Tax Law Upo	late Test for Circula	er 230	Professional	ls										
Federal Tax Law Update Tes qualify for this certification, the certification level can prepare in Publication 4012, VITA/TCE Note: Advanced certification is Publication 4396-A, Partner Re Professional designation (Attorney, CPA, or Enrolled A	e license information bel any tax returns that fall E Volunteer Resource G is necessary for qualifica esource Guide, for mon	ow mus within to uide. So tion for e inform	st be completed the scope of the ee Publication CE Credits, the nation about receing jurisdiction	d by the very legal to the virtual t	olunte CE Pro ite Co I Tax L	er and ver grams. (A ordinator aw Updat CE Credits	rified by dvanced Handbe e Test of s. ense, re	the partner or site cd, HSA, Military, etc. ook, for additional does not qualify the vgistration, or	oordinat ) A Sco require voluntee	tor. Voluntee pe of Service <b>ments and i</b>	rs with the Chart is nstruction CE Cred	nis s located ons. its. See		
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Instructions: Complete this without a PTIN for Enrolled governing board requiremen completed form to the SPEC Site Coordinator Corner or	Agents or Non-creder its for obtaining CE Cr C Territory Office/Relat	ntialed <sub> </sub> edits. T ionship	preparers. CP he site coordi Manager for	As, attori nator, sp further p	neys, oonsor rocess	or CFPs of ing partnersing. <b>Refe</b>	do not r er, or in er to the	require a PTIN; how estructor must sign e Fact Sheet - Cor	vever, the and dat Intinuing	hey must ch te this form a	eck with and sen	their d the		
Name as listed on PTIN card  Volunteer Properties P -					parer's Tax Identification Number (PT					OTEC ID number (if applicable) A				
Address (VITA/TCE Site or teaching location)					Site Identification Number (SIDN) S -									
Professional Status (che Enrolled Agent (EA) Attorney	eck only one box)		Certified Public		`	,		Non-credent (Participatir Program)				ason		
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					(Minimum of 10 volunteer hours required to issue CE Credits)  Total hours volunteered									
OR				(qu	(qualifies for 14 CE credits)  Total hours volunteered  OR									
Advanced and One or More Specialty Courses				(qu	(qualifies for 18 CE credits)									
Site Coordinator, Sponsor the activities this volunteer p				form, I d	declare	that I ha	ve valid	dated that the repor	ted vol	unteer hours	are ba	sed on		
Approving Official's (print	fed) name and title (	site co	ordinator, spo	nsoring p	oartne	r, instruct	or)							
Approving Official's signa	ture								Date signed					



Tina vonSchweinitz <tinavon86@gmail.com>

### Status for Tax Season 2021

1 message

wlz <billz@suddenlink.net>

Tue, Sep 8, 2020 at 1:46 PM

### TX2 District 3 Volunteers

Our current understanding is that Tax-Aide will operate in a somewhat different format for the tax season next year. The plan is that taxpayers will meet with a Client Facilitator and Counselor at a 'virtual site' to drop off their tax documents and intake forms. The documents will be scanned and provided to counselors at the same or possibly a different location to prepare and review the return. When the return is ready to file, the taxpayer will return to the drop-off site to sign documents so the return can be e-filed.

I realize this is only a very high level overview and begs more questions than it answers as there are still many details to be worked out. Our objective is to get an idea of the number of volunteers planning to return as we begin organizing the training and other pre-season activities for next year. Please indicate below your thoughts today as to whether or not you are planning to return as a Tax-Aide volunteer in 2021.

This is not a commitment, only an indication of your thinking today.

Please click one of the options below. A return email should open, it may not show a subject but that's OK. Click send and your status will be added to the poll.

- 1 Yes, I am planning to return for tax season 2021.
- 2 No, I am not planning to return for tax season 2021.
- 3 I am undecided about volunteering for tax season 2021.

Thanks for your assistance.

--Bill Z TX2D3 TC --

Form **13615** 

Department of the Treasury - Internal Revenue Service

### Volunteer

(October 2020)

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**IRC 7216(a)** - Imposes criminal penalties on tax return preparers who knowingly or recklessly make unauthorized disclosures or uses of information furnished in connection with the preparation of an income tax return. A violation of IRC 7216 is a misdemeanor, with a maximum penalty of up to one year imprisonment or a fine of not more than \$1,000, or both, together with the cost of prosecution.

### Generated From Link & Learn Taxes

Volunteer:												
By signing this form, I do												
Full name (please print)					Vol			IRS Employee				
Home address (street, c	ity, state and ZIP code)											
Email address Daytime te						Spons	ponsoring partner name/site name					
Number of years volunt	gnature <i>(ele</i>	OR S										
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Standards of Conduct (Required for ALL)	Intake/Interview & Quality Review	Site Coordii Tes	nator Ba	asic	Advanced	Military	Military Internationa		o Rico 2	Foreign Students		
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Federal Tax Law Update T To qualify for this certification certification level can prepar Publication 4012, VITA/TCE Note: Advanced certification Volunteer Test qualify the volunteer	on, the license information re any tax returns that fall Volunteer Resource Gui n is necessary to qualify fo	below must within the so de. See Pub or Continuing	be completed cope of the VI lication 1084, g Education (C	I by the TA/TCE Site Co CE) Cred	volunteer and Programs. (A ordinator Handits. Neither th	verified by the dvanced, Militabook, for add to Federal Tax	e partner or site of tary, etc.) A Scop ditional requirement of Law Update Te	coordinator be of Servicents and ins st nor the O	<ul> <li>Volunte ce Chart struction</li> <li>Qualified</li> </ul>	eers with this is located in s. Experienced		
Professional designation (Attorney, CPA, or Enrolled Agent)  Licensing jurisdic (state)						ense, registra ent number	tion, or	Effective or issue date		Expiration date (if provided)		
Site Coordinator, Spons							ave verified the	required o	certificat	ion level(s) and		
Approving Official's (printed) name and title (site coordinator, sponsoring partner, instructor or IRS contact)  Signa								nature (type/print) Date				
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Parent/Guardian name	·	nat i give pi	Signatur				/print) Date					
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Advanced OR					Total hours volunteered (qualifies for 14 CE credits)  OR							
Advanced and One		Total hours volunteered (qualifies for 18 CE credits)  n, I declare that I have validated that the reported volunteer hours are based on										
the activities this volunteer	performed in my site or	r training fac	cility.									
Approving Official's ( site coordinator, sponsori		е	Signatur	re (eled	ctronic)	OR	Signature (type,	/print)		Date		



Tina vonSchweinitz <tinavon86@gmail.com>

### Fwd: FW: Alternate Tax Prep Program (ATP)

1 message

Bill Z <billz.tc@gmail.com>

Thu, Oct 7, 2021 at 8:20 AM

FYI

----- Forwarded Message ------

Subject:FW: Alternate Tax Prep Program (ATP) Date:Wed, 6 Oct 2021 21:43:30 -0500

From:jgreen1897@austin.rr.com

Hi.

Chad sent out a very good explanation of ATP to his LCs; I thought I'd share in case you'd like to steal.

Arlene

The ATP program is an offshoot of TaxAide where by the taxpayer prepares their own return online with the remote help of a TaxAide counselor. The Taxpayer accesses the program via AARP and prepares their return using essentially the same version of TaxSlayer that we use. The taxpayer can at any time request the help of participating TaxAide volunteers by contacting AARP and AARP in turn, working thru a state level coordinator, hooks the taxpayer up with a participating counselor. The counselor, using Google Meet, has audio and video contact to view the taxpayer's documents and desktop and talk to the taxpayer. The taxpayer is responsible for the completeness and accuracy of their return.

The program began as an TaxAide adjunct for remote taxpayers but expanded under COVID. Altho there was a demand, not many Texas TaxAide volunteers participated. Given the current COVID uncertainties, AARP is again expecting a high taxpayer demand for ATP and is therefore looking to expand Texas participation. Volunteers must be a certified counselor, can work from home, and must use a Chromebook and their AARP Google user ID. Volunteers may work ATP only or may work both ATP and a local TaxAide site. In addition to "assisting counselor" positions, ATP also has a need for state and local level administrators to coordinate the contact between the taxpayer and assisters.

Details of the program are available on the portal, in the Service Model folder. It was also the topic of a recent Regional seminar. Attached is a slide show and a summary file of the presentation by the AARP ATP coordinator, Donna Schwartz. A video of her 40 minute presentation is available from the link below (when link opens, ignore the message and click on the "play" arrow lower left; a small video window opens upper right. Click on the double arrow at upper right of that widow to increase size. Adjust volume as needed. There is a 30 second intro by Regional Coordinator Bart Hatfield.)

https://aarptaxaide.webex.com/webappng/sites/aarptaxaide/recording/e426e47c3cef434aa982746019ac697e/playback

If you or any of your counselors think they may want to participate, either in addition to or in lieu of volunteering at your site, please have them contact me. Sooner is better but there is no deadline



Virus-free. www.avg.com



# Bill Zitterich **District Coordinator** TX2, District 3

m) 512-948-2338 h) 512-947-0237

## 2 attachments



ATP PPT Donna Schwartz.pptx



ATP Pre-Read Donna Schwartz.docx 16K



## Tina vonSchweinitz <tinavon86@gmail.com>

# Re: Welcome Back TaxAide Volunteers!

1 message

Diane Vince <dizanvince@gmail.com> To: Tina vonSchweinitz <tinavon86@gmail.com> Thu, Sep 1, 2022 at 6:25 PM

Hello Tina!

Welcome aboard!

Here's the agenda for New Volunteer Training in November. Planning to send training scenarios in October unless you want them sooner. Training scenarios cover most all tax issues we see in TaxAide. Will have Chromebook for you in

Happy to have you join us!





**Agenda - New Volunteer Orientation.docx** 

Form **13615** (October 2022)

Department of the Treasury - Internal Revenue Service

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# Generated From Link & Learn Taxes

Volunteer:												
By signing this form, I do comply with the standard												
Full name (please print)				Volunteer position(s)				☐ IRS Employee				
Home address (street, c	ity, state and ZIP code)											
Email address			Daytim	e telepho	one			Sponse	oring partner	name/site	e name	}
Number of years volunt	eered (including this ye	ear) S	Signatu	ire (eleci	tronic)	)		OR Signa	ature (type/pri	nt)		Date
	Volunteer Ce	ertificati	ion Le	vels (Ad	d the	lette	er "P" for	all passing	g test scores)			
Volunteer Standards of Conduct (Required for ALL)	Intake/Interview & Quality Review		Site rdinato	. Bas	sic	Adv	vanced	Military	Internation		to Rico	Foreign Students
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# H&R BLOCK RETURN NOTES TY2015 Version

# H&R Block Return Notes TY2015

By Tina von Schweinitz

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142.4   GIFTS TO CHARITY: LINE 16-19     142.6   JOB EXPENSES & CERTAIN MISC DEDUCTIONS (SUBJECT TO 2%): LINE 21-27     142.7   OTHIER MISC DEDUCTIONS (NONE 2%): LINE 28     142.8   SCHEDULE A LIMITATIONS (PRE TYZ010 AND TYZ011).     142.9   RECLAIMING PRIOR YEAR SCHEDULE A DEDUCTIONS     142.10   FORCE SCHEDULE A OR NOT     143.1   INTEREST     143.2   OTHER INTEREST AND DIVIDENDS     143.1   INTEREST     143.2   OTHER INTEREST ITEMS     143.3   BONDS FROM SECONDARY MARKET     143.4   MUNI BONDS     143.5   US TREASURY OBLIGATIONS     143.6   FROZEN BANK ACCOUNTS: INTEREST     143.7   DIVIDENDS     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART III: INVENTORY METHOD     144.4   PART II: DEDUCTIONS     145.5   RETURN OF CAPITAL GAIN NDEB     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.9   WASH SALE RULES     145.11   OPTIONS CALLS AND NDEB     145.12   SOFTION OR ALE STRUCTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.1   BONDS AND IDES     145.2   RETURN OF CAPITAL AND NDEB     145.3   SOFTION NON TAITUTORY STOCK PLANS (NO, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.1   OPTIONS CALL AND PUT     146.1   RENTAL CASUAL     146.1   RENTAL CASUAL				
142.5   CASUALTY & THEFT LOSSES. LINE 20     142.6   JOB EXPENSES & CERTAIN MISC DEDUCTIONS (SUBJECT TO 2%): LINE 21-27     142.7   OTHER MISC DEDUCTIONS (NONE 2%): LINE 28     142.8   SCHEDULE A LIMITATIONS (PRE TY2010 AND TY2011).     142.9   FORCE SCHEDULE A OR NOT     142.10   FORCE SCHEDULE A OR NOT     143.1   INTEREST     143.2   OTHER INTEREST AND DIVIDENDS     143.1   INTEREST     143.2   OTHER INTEREST AND DIVIDENDS     143.3   BONDS FROM SECONDARY MARKET     143.4   MUNI BONDS     143.5   US TREASURY OBLIGATIONS     143.6   FROZEN BANK ACCOUNTS: INTEREST     143.7   DIVIDENDS     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON 12439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART III: INVENTORY METHOD     144.4   PART II: DEDUCTIONS     145.1   BONDS AND COS     145.1   BONDS AND COS     145.2   RETURN OF CAPITAL AND NDEB     145.3   SIFEDULE C : CAPITAL GAIN/LOSS (ASSETS)     145.4   STOCK RIGHTS (WARRANTS)     145.5   TEMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NO, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NO)     145.7   EMPLOYEE STOCK PUECHASE PLANS (ESPPS)     145.8   NICENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALLZED STOCK     146.1   RENTAL AND ROYALTIES     146.1   RENTAL CASUAL     146.2   RENTAL CASUAL     146.3   RENTAL SALE				
142.6   JOB EXPENSES & CERTAIN MISC DEDUCTIONS (SUBJECT TO 2%): LINE 21-27.     142.7   OTHER MISC DEDUCTIONS (NONE 2%): LINE 28.     142.8   SCHEDULE A LIMITATIONS (PRE TY 2010 AND TY 2011)				
142.7				
142.8   SCHEDULE A LIMITATIONS (PRE TY2010 AND TY2011).   142.10   FORCE SCHEDULE A OR NOT		142.6		
142.9   RECLAIMING PRIOR YEAR SCHEDULE A DEDUCTIONS     142.10   FORCE SCHEDULE A OR NOT     143.1   INTEREST   SCHEDULE B: INTEREST AND DIVIDENDS     143.2   OTHER INTEREST ITEMS     143.3   BONDS FROM SECONDARY MARKET.     143.4   MUNI BONDS     143.6   FROZEN BANK ACCOUNTS: INTEREST     143.7   DIVIDENDS     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON 1299DIV     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.14   SCHEDULE C: BUSINESS INCOMELOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART II: INVENTORY METHOD     144.4   PART II: DEDUCTIONS     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.1   BONDS AND CDS     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   SCHEDULE D: VRESTRED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   NICENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SONET SALE RULES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.3   RENTAL SALE     146.3   RENTAL SALE     146.4   ROYALTIES     146.4   ROYALTIES		142.7	OTHER MISC DEDUCTIONS (NONE 2%): LINE 28	75
142.9   RECLAIMING PRIOR YEAR SCHEDULE A DEDUCTIONS     142.10   FORCE SCHEDULE A OR NOT     143.1   INTEREST   SCHEDULE B: INTEREST AND DIVIDENDS     143.2   OTHER INTEREST ITEMS     143.3   BONDS FROM SECONDARY MARKET.     143.4   MUNI BONDS     143.6   FROZEN BANK ACCOUNTS: INTEREST     143.7   DIVIDENDS     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON 1299DIV     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.14   SCHEDULE C: BUSINESS INCOMELOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART II: INVENTORY METHOD     144.4   PART II: DEDUCTIONS     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.1   BONDS AND CDS     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   SCHEDULE D: VRESTRED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   NICENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SONET SALE RULES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.3   RENTAL SALE     146.3   RENTAL SALE     146.4   ROYALTIES     146.4   ROYALTIES		142.8	SCHEDULE A LIMITATIONS (PRE TY2010 AND TY2011)	
142.10   FORCE SCHEDULE A OR NOT.     143.1   INTEREST   ITEMS       143.2   OTHER INTEREST ITEMS       143.3   BONDS FROM SECONDARY MARKET       143.4   MUNI BONDS       143.5   US TREASURY OBLIGATIONS       143.6   FROZEN BANK ACCOUNTS: INTEREST       143.7   DIVIDENDS       143.9   CAPITAL GAIN DISTRIBUTION ON 1099DIV       143.9   CAPITAL GAIN DISTRIBUTION ON F2439       143.10   INVESTMENT INTEREST EXPENSES       143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS       143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC       143.13   FOREIGN ACCOUNTS       143.14   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)       144.1   GENERAL INFORMATION       144.2   PART I: INCOME       144.3   PART III: ENVENTORY METHOD       144.4   PART II: DEDUCTIONS       145.1   BONDS AND CDS       145.1   BONDS AND CDS       145.2   RETURN OF CAPITAL AND NDEB       145.3   GIFTS AND INHERITANCE HOLDING PERIOD       145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NO, RSU, ISO, ESSP)       145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NO)       145.1   OPTIONS CALL AND PUT       145.2   SALE OF DEMUTUALIZED STOCK       146.3   RENTAL AND ROYALTIES       146.3   RENTAL AND ROYALTIES       146.3   RENTAL ALL       146.4   ROYALTIES       146.7   RENTAL       146.7   RENTAL       146.8   RENTAL SALE       146.9   RENTAL SALE       146.1   RENTAL       146.4   ROYALTIES       146.4   ROYALTIES		142.9	RECLAIMING PRIOR YEAR SCHEDULE A DEDUCTIONS	75
143.1   INTEREST ITEMS				
143.1			FOUL F R. INTEREST AND DIVIDENDS	75
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143.4   MUNI BONDS.     143.5   US TREASURY OBLIGATIONS     143.6   FROZEN BANK ACCOUNTS: INTEREST     143.7   DIVIDENDS.     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES.     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART II: NEVENTORY METHOD     144.4   PART II: DEDUCTIONS:     145.1   SCHEDULE D: CAPITAL GAIN/LOSS (ASSETS)     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.4   STOCK RIGHTS (WARRANTS)     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   NICENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SHORT SALES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.1   RENTAL     146.2   RENTAL     146.3   RENTAL     146.4   ROYALTIES				
143.5 US TREASURY OBLIGATIONS.   143.6 FROZEN BANK ACCOUNTS: INTEREST   143.7 DIVIDENDS   143.8 CAPITAL GAIN DISTRIBUTION ON 1099DIV   143.9 CAPITAL GAIN DISTRIBUTION ON 12439   143.10 INVESTMENT INTEREST EXPENSES.   143.11 RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS   143.12 DIVIDENDS DECLARED IN OCT, NOV, DEC   143.13 FOREIGN ACCOUNTS   144.1 GENERAL INFORMATION   144.2 PART II: INFORMATION   144.2 PART II: INVENTORY METHOD.   144.3 PART III: INVENTORY METHOD.   144.4 PART II: DEDUCTIONS:   145.1 BONDS AND CDS.   145.1 BONDS AND CDS.   145.2 RETURN OF CAPITAL AND NDEB   145.3 GIFTS AND INHERITANCE HOLDING PERIOD.   145.5 STOCK RIGHTS (WARRANTS).   145.5 TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP).   145.6 W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ).   145.7 EMPLOYEE STOCK PURCHASE PLANS (ESPPS)   145.8 INCENTIVE STOCK OPTIONS (ISO).   145.9 WASH SALE RULES   145.11 OPTIONS CALL AND PUT.   145.12 SALE OF DEMUTUALIZED STOCK.   145.11 OPTIONS CALL AND PUT.   145.12 SALE OF DEMUTUALIZED STOCK.   146.1 RENTAL   146.2 RENTAL CASUAL   146.3 RENTAL SALE   146.4 ROYALTIES.   146.4 ROYAL				
143.6   FROZEN BANK ACCOUNTS: INTEREST   143.7   DIVIDENDS   143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV   143.9   CAPITAL GAIN DISTRIBUTION ON F2439   143.10   INVESTMENT INTEREST EXPENSES   143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS   143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC   143.13   FOREIGN ACCOUNTS   143.14   GENERAL INFORMATION   144.1   GENERAL INFORMATION   144.2   PART I: INCOME   144.1   GENERAL INFORMATION   144.2   PART I: INCOME   144.4   PART II: DEDUCTIONS:   145.1   BONDS AND CDS   (ASSETS)   145.1   BONDS AND CDS   145.2   RETURN OF CAPITAL GAIN/LOSS (ASSETS)   145.3   GIFTS AND INHERITANCE HOLDING PERIOD   145.4   STOCK RIGHTS (WARRANTS)   145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)   145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)   145.7   EMPLOYEE STOCK OPTIONS (ISO)   145.9   WASH SALE RULES   145.10   SHORT SALES   145.11   OPTIONS CALL AND PUT   145.11   OPTIONS CALL AND PUT   145.11   OPTIONS CALL AND PUT   145.12   SALE OF DEMUTUALIZED STOCK   146.1   RENTAL   AND ROYALTIES   146.2   RENTAL CASUAL   146.3   RENTAL CASUAL   146.4   ROYALTIES   146.5   ROYALTIES   146.6   ROYALTIES		143.4		
143.7   DIVIDENDS     143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART III: INVENTORY METHOD     144.4   PART II: DEDUCTIONS:     145.5   SCHEDULE D: CAPITAL GAIN/LOSS (ASSETS)     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.4   STOCK RIGHTS (WARRANTS)     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   INCENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SHORT SALES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.1   RENTAL     146.2   RENTAL CASUAL     146.3   RENTAL SALE     146.4   ROYALTIES		143.5	US TREASURY OBLIGATIONS	77
143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART III: INVENTORY METHOD     144.4   PART II: DEDUCTIONS:     145.1   BONDS AND CDS     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.4   STOCK RIGHTS (WARRANTS)     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   INCENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SHORT SALES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.1   RENTAL     146.2   RENTAL     146.3   RENTAL     146.4   ROYALTIES		143.6	FROZEN BANK ACCOUNTS: INTEREST	77
143.8   CAPITAL GAIN DISTRIBUTION ON 1099DIV     143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART III: INVENTORY METHOD     144.4   PART II: DEDUCTIONS:     145.1   BONDS AND CDS     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.4   STOCK RIGHTS (WARRANTS)     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   INCENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SHORT SALES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.1   RENTAL     146.2   RENTAL     146.3   RENTAL     146.4   ROYALTIES		143.7	DIVIDENDS	7
143.9   CAPITAL GAIN DISTRIBUTION ON F2439     143.10   INVESTMENT INTEREST EXPENSES     143.11   RETURN OF CAPITAL AND NDEB AND PAYMENT IN LIEU OF DIVIDENDS     143.12   DIVIDENDS DECLARED IN OCT, NOV, DEC     143.13   FOREIGN ACCOUNTS     144.1   SCHEDULE C: BUSINESS INCOME/LOSS (SELF-EMPLOYMENT INCOME)     144.1   GENERAL INFORMATION     144.2   PART I: INCOME     144.3   PART II: INVENTORY METHOD     144.4   PART II: DEDUCTIONS:     145.5   SCHEDULE D: CAPITAL GAIN/LOSS (ASSETS)     145.1   BONDS AND CDS     145.2   RETURN OF CAPITAL AND NDEB     145.3   GIFTS AND INHERITANCE HOLDING PERIOD     145.4   STOCK RIGHTS (WARRANTS)     145.5   TERMS FOR NON-STATUTORY AND STATUTORY STOCK PLANS (NQ, RSU, ISO, ESSP)     145.6   W2 CODE V: RESTRICTED STOCK UNITS (RSU) OR NON QUALIFIED STOCK OPTION (NQ)     145.7   EMPLOYEE STOCK PURCHASE PLANS (ESPPS)     145.8   INCENTIVE STOCK OPTIONS (ISO)     145.9   WASH SALE RULES     145.10   SHORT SALES     145.11   OPTIONS CALL AND PUT     145.12   SALE OF DEMUTUALIZED STOCK     146.1   RENTAL     146.2   RENTAL     146.3   RENTAL     146.4   ROYALTIES				
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### 1. FILING REQUIREMENT

See Key Information Attachement and Tax Book

Even if not required to file, may want to file to

- 1. Requesting a refund iftaxes were overpaid
- 2. Obtaining a refundable credit. Ex: Additional Child tax credit, Homebuyer credit, American Opportunity Credit, and others.
- 3. Establishing a capital loss or reporting a basis on Schedule D.
- 4. Have Health Care through Federal Market and received 1095-A and need to confirm Premium Credit

# 2. 1040EZ REQUIREMENTS

You can use Form 1040EZ if all the items in this checklist apply.

Your filing status is single or married filing jointly. If you were a nonresident alien at any time in 2011, see Nonresident aliens below.

You do not claim any dependents.

You do not claim any adjustments to income. Use TeleTax topics 451-453 and 455-458 in Section 6, later.

You claim only the earned income credit. Use TeleTax topics 601-602, 607-608, and 610-612 in Section 6, later.

You (and your spouse if filing a joint return) were under age 65 and not blind at the end of 2011. If you were born on January 1, 1947, you are considered to be age 65 at the end of 2011 and cannot use Form 1040EZ.

Your taxable income (line 6 of Form 1040EZ) is less than \$100,000.

You had only wages, salaries, tips, taxable scholarship or fellowship grants, unemployment compensation, or Alaska Permanent Fund dividends, and your taxable interest was not over \$1,500.

If you earned tips, they are included in boxes 5 and 7 of your Form W-2.

You do not owe any household employment taxes on wages you paid to a household employee. To find out who owes these taxes, use TeleTax topic 756 in Section 6, later.

You are not a debtor in a chapter 11 bankruptcy case filed after October 16, 2005.

You do not have "Allocated Tip" on W2 box 8 (must use f1040)

You do not receive a 1095-A for Health Market Place plan

If you do not meet all of the requirements, you must use Form 1040A or 1040.

### 3. 1040A REQUIREMENTS

You can use Form 1040A if all six of the following apply.

1: You only had income from the following sources:

Wages, salaries, tips.

Interest and ordinary dividends.

Capital gain distributions.

Taxable scholarship and fellowship grants.

Pensions, annuities, and IRAs.

Unemployment compensation.