

# SOI Projects, Contacts, and Public Release Information

General Statistical Information: (202) 874-0410 Fax: (202) 874-0964 e-mail: [sis@irs.gov](mailto:sis@irs.gov)

| Project name and contact   | Program content and frequency  | Program year | End of tax year | Close of Filing Period | Close of filing period (with extensions) | Close of sampling period | Date of public release |
|--|--|--------------|-----------------|------------------------|--|--------------------------|------------------------|
| <b>Bonds, Tax Exempt:</b><br>Aaron Barnes  | This annual study provides information on private activity and Governmental bond issues by type of property financed, size of face amount, and State.  | 2011         | N/A             | N/A                    | N/A                                      | December 2012            | July 2013              |
| <b>Corporations, Complete Report Tabulations:</b><br>Bill Rush                             | This annual report provides comprehensive data on corporation income tax returns classified by industry, size of total assets, and size of business receipts.  | 2010         | June 2011       | September 2011         | March 2012                               | June 2012                | April 2013             |
| <b>Corporations, Foreign Tax Credit:</b><br>Scott Luttrell<br>Lissa Costa<br>Nuria McGrath | This annual study provides data on foreign income, taxes paid, and foreign tax credit reported on corporation foreign income tax returns. Data are classified by industry group and country.   | 2010         | June 2011       | September 2011         | March 2012                               | June 2012                | August 2013            |
| <b>Corporations, Interest-Charge Domestic International Sales:</b><br>Dan Holik            | These corporations replaced the Domestic International Sales Corporations, or DISCs, as of 1985. Balance sheet, income statement, and export-related data are tabulated every 2 years.   | 2010         | June 2011       | September 2011         | March 2012                               | June 2012                | June 2013              |
| <b>Corporations, Source Book:</b><br>Bill Rush   | This annual publication presents detailed income statement, balance sheet, tax, and selected items, by sector, major and minor industrial groups and size of total assets for all returns and separately for returns with net income.  | 2011         | June 2012       | September 2012         | March 2013                               | June 2013                | December 2013          |
| <b>Corporations, U.S. Controlled Foreign:</b><br>Jason Wenrich                             | This semiannual study provides data on activities of foreign corporations that are controlled by U.S. corporations. Data are classified by industry group and country.   | 2010         | June 2011       | September 2011         | March 2012                               | June 2012                | December 2013          |
| <b>Estate Tax:</b><br>Brian Raub<br>Joseph Newcomb   | This annual study provides information on a gross estate and its composition, deductions, and tax and information on the age, sex, and marital status of decedents. Basic estate tax return data, by year in which returns are filed, are produced each year. Other statistics are available on a year-of-death basis (approximately every 3 years). | 2011         | N/A             | N/A                    | N/A                                      | December 2011            | October 2012           |
| <b>Estate Tax, Nonresident Alien:</b><br>Melissa Belvedere                                 | This annual study provides information on gross estates, including composition, deductions, and tax, of nonresident aliens who owned at least \$60,000 worth of property within the U.S. at time of death.   | 2012         | N/A             | N/A                    | N/A                                      | December 2012            | August 2013            |

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| <b>Gift Tax:</b><br>Melissa Belvedere   | This annual study provides data for type and amount of gift, information on donee, and tax computation items. Information about the donor and gift splitting is also available.  | 2011         | N/A             | N/A                    | N/A                                      | December 2011            | October 2012           |
| <b>Individuals, Advance Data:</b><br>Scott Hollenbeck<br>Maureen Keenan Kahr<br>Michael Parisi<br>Karen Turnbull-Saunders         | This annual study provides information on income, deductions, taxes, and credits reported on individual income tax returns and associated schedules. The file contains information on returns filed through Cycle 38 weighted up to represent a full year of data. | 2011         | December 2011   | April 2012             | October 2012                             | September 2012           | February 2013          |
| <b>Individuals, Complete Report File:</b><br>Scott Hollenbeck<br>Maureen Keenan Kahr<br>Michael Parisi<br>Karen Turnbull-Saunders | This annual study provides information on income, deductions, taxes, and credits reported on individual income tax returns and associated schedules.   | 2011         | December 2011   | April 2012             | October 2012                             | December 2012            | August 2013            |
| <b>Individuals, Complete Report Tabulations:</b><br>Michael Parisi<br>Justin Bryan  | Basic data are produced annually and cover income, deductions, tax, and credits reported on individual income tax returns and associated schedules. Data are classified by size of adjusted gross income, marital status, age, or type of tax computation.         | 2011         | December 2011   | April 2012             | October 2012                             | December 2012            | August 2013            |
| <b>Individuals, County Income:</b><br>Kevin Pierce  | County or State income data are available annually.  | 2010         | December 2010   | April 2011             | October 2011                             | December 2011            | September 2012         |
| <b>Individuals, Foreign Person's Real Property Tax:</b><br>Scott Luttrell   | This annual study provides data on distributions of U.S. real property interests by foreign persons.   | 2010         | December 2010   | April 2011             | October 2011                             | September 2012           | June 2013              |
| <b>Individuals, Income Tax Percentile Tabulations:</b><br>Michael Parisi<br>Tony Hall   | This annual study provides data on income and tax distribution for all non dependent individual income tax returns by percentiles.   | 2010         | December 2010   | April 2011             | October 2011                             | December 2011            | October 2012           |
| <b>Individuals, Mid-July Filing Season Statistics:</b><br>Barry Johnson   | Number of returns, total income, total tax and share of income composed of capital gains, by AGI category, reported through week 30 of the processing season.  | 2013         | December 2013   | N/A                    | N/A                                      | N/A                      | August 2013            |

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| <b>Individuals, Mid-November Filing Season Statistics:</b><br>Barry Johnson                        | Number of returns, total income, total tax and share of income composed of capital gains, by AGI category, reported through week 47 of the processing season.   | 2013         | December 2013   | April 2013             | October 2013                             | N/A                      | December 2013          |
| <b>Individuals, Noncash Charitable Contributions:</b><br>Janette Wilson; P.J. Liddell; Young Lim   | This study of individual income tax returns provides detailed asset donations, descriptions of the donees, donor cost, fair market value, and deduction claimed on Form 8283, Noncash Charitable Contributions.                       | 2010         | December 2010   | April 2011             | October 2011                             | December 2011            | May 2013               |
| <b>Individuals, Nonfarm Sole Proprietorships:</b><br>Jeff Curry<br>Adrian Dungan                   | Basic data, produced annually, cover business receipts, deductions, and net income reported on Schedule C, Profit or Loss From Business, for nonfarm proprietors, classified by industry group.                                       | 2011         | December 2011   | April 2012             | October 2012                             | December 2012            | August 2013            |
| <b>Individuals, Sales of Capital Assets, Panel:</b><br>Janette Wilson<br>P.J. Liddell<br>Young Lim | This periodic study provides detailed data on the sales of capital assets reported in the capital gains schedule of the individual income tax return, and on sales of residences and personal or depreciable business property.       | 1999–2007    | December 2010   | April 2011             | October 2011                             | December 2011            | August 2013            |
| <b>Individuals, Withholding on Foreign Recipients of U.S. Income:</b><br>Scott Luttrell            | This annual study provides data by country on income paid to nonresident aliens and the amount of tax withheld for the U.S. Government.   | 2010         | December 2010   | March 2011             | April 2011                               | March 2012               | September 2012         |
| <b>International Boycott Report:</b><br>Lissa Costa  | This study provides data on business operations of U.S. "persons" in boycotting countries, as well as the requests and agreements to participate in, or cooperate with, international boycotts not sanctioned by the U.S. Government. | 2010         | December 2010   | April 2011             | September 2011                           | July 2012                | October 2012           |
| <b>Partnerships, Income:</b><br>Nina Shumofsky   | Basic data, produced annually, cover income statement, balance sheet, and details from supporting schedules. Data are classified chiefly by industry group.   | 2011         | December 2011   | April 2012             | September 2012                           | December 2012            | July 2013              |
| <b>Partnerships, Withholding on Foreign Recipients of U.S. Income:</b><br>Scott Luttrell           | This annual study provides data on U.S. partnership payments to foreign partners. Data are classified by country and recipient type.  | 2010         | December 2010   | April 2011             | October 2011                             | September 2012           | May 2013               |

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| <b>S Corporations Tabulations:</b><br>Isaac Goodwin<br>Heather Parisi           | Annual study data are collected for the income statement and balance sheet, and from supporting schedules. Data are classified by industry group or asset size.  | 2011         | June 2012       | September 2012         | March 2013                               | June 2013                | December 2013          |
| <b>Tax-Exempt Organizations (Except Private Foundations)</b><br>Paul Arnsberger | This annual study provides balance sheet and income statement data for organizations classified as tax-exempt under subsections 501(c)(3)–(9) of the Internal Revenue Code.  | 2010         | November 2011   | April 2012             | October 2012                             | December 2012            | July 2013              |
| <b>Tax-Exempt Organizations (Private Foundations)</b><br>Cynthia Belmonte       | This annual study provides balance sheet and income statement data for domestic private foundations and charitable trusts filing a Form 990-PF.  | 2010         | November 2011   | April 2012             | October 2012                             | December 2012            | July 2013              |
| <b>Tax-Exempt Organizations, Unrelated Business Income</b><br>Jael Jackson      | This annual study provides data on unrelated business income and deductions for organizations classified as tax-exempt under the Internal Revenue Code.  | 2009         | November 2010   | April 2011             | October 2011                             | December 2011            | October 2012           |
| <b>Trusts (and Estates), Income Tax</b><br>Joseph Newcomb                       | This annual study provides data on income, deductions, gains, and losses reported by estates and trusts, as well as distributions to beneficiaries and income tax liability.   | 2011         | N/A             | N/A                    | N/A                                      | December 2011            | October 2012           |
| <b>Trusts, Foreign</b><br>Dan Holik   | This periodic study, conducted every 4 years, provides data on foreign trusts that have U.S. "persons" as grantors, transferors, or beneficiaries. Data include country where the trust was created, value of transfer to the trust, and year the trust was created. | 2010         | December 2010   | April 2011             | October 2011                             | March 2012               | February 2013          |
| <b>Trusts, Split-Interest</b><br>Lisa Rosenmerkel                               | This annual study provides information on charitable remainder trusts, charitable lead trusts, and pooled income funds. Data include balance sheet, income, deductions, and detail from accumulation and distribution schedules.                                     | 2011         | N/A             | N/A                    | N/A                                      | December 2011            | October 2012           |
|   |  |              |                 |                        |  |                          |                        |