

SOI Projects, Contacts, and Public Release Information

General Statistical Information: (202) 803-9285 Fax: (202) 803-9393 e-mail: 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
Individuals, County Data: Kevin Pierce	County or State income data are available annually.	2011	December 2011	April 2012	October 2012	December 2012	January 2014
Corporations, U.S. Controlled Foreign: 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	January 2014
Individuals, Foreign Earned Income and Foreign Tax Credit: Scott Hollenbeck; Maureen Keenan Kahr	This periodic study is conducted every 5 years. It covers foreign-earned income, foreign-earned exclusion, foreign housing exclusion, foreign income, foreign taxes paid, and foreign tax credit shown on individual income tax returns. Data are classified by size of adjusted gross income and country.	2011	December 2011	April 2012	October 2012	December 2012	February 2014
Individuals, Noncash Charitable Contributions: 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 deductions claimed on Form 8283, <i>Noncash Charitable Contributions</i> .	2011	December 2011	April 2012	October 2012	December 2012	February 2014
Individuals, Advance Data: Scott Hollenbeck; Maureen Keenan Kahr; Michael Parisi; 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.	2012	December 2012	April 2013	October 2013	September 2013	February 2014
SOI Bulletin: Wayne Kei	Winter Issue	2014	N/A	N/A	N/A	N/A	February 2014
Individuals, Migration Flow Data: Kevin Pierce	Migration flow data (based on year-to-year changes in individual tax return addresses) provide data on the number of returns, number of exemptions, and aggregate adjusted gross income at the State and county level.	2011	December 2011	April 2012	October 2012	December 2012	March 2014
Individuals, ZIP Code Data: Kevin Pierce	This study provides detailed tabulations of individual income tax return data at the State and ZIP code level.	2008	December 2008	April 2009	October 2009	December 2008	March 2014

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Corporations, Complete Report Tabulations: 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.	2011	June 2012	September 2012	March 2013	June 2013	May 2014
SOI Bulletin: Wayne Kei	Spring Issue	2014	N/A	N/A	N/A	N/A	May 2014
Partnerships, Withholding on Foreign Recipients of U.S. Income: Scott Luttrell	This annual study provides data on U.S. partnership payments to foreign partners. Data are classified by country and recipient type.	2011	December 2011	April 2012	October 2012	September 2013	May 2014
Individuals, Mid-May Filing Season Statistics: Barry Johnson	Number of returns, total income, total tax and share of income composed of capital gains, by AGI category, reported through week 20 of the processing season.	2014	December 2014	N/A	N/A	N/A	June 2014
Individuals, High-Income Returns Study: Justin Bryan	This annual study provides detailed data on returns with adjusted gross income or expanded income greater than \$200,000. The study also looks at high-income nontaxable returns (HINTs) and the reason for nontaxability. Tables are provided annually to OTA. An annual <i>Bulletin</i> article is also produced.	2011	December 2011	April 2012	October 2012	December 2012	June 2014
Individuals, Foreign Person's Real Property Tax: Scott Luttrell	This annual study provides data on distributions of U.S. real property interests by foreign persons.	2011	December 2011	April 2012	October 2012	September 2013	June 2014
Partnerships, Income: Nina Shumofsky	Basic data, produced annually, cover income statement, balance sheet, and details from supporting schedules. Data are classified chiefly by industry group.	2012	December 2012	April 2013	September 2013	December 2013	July 2014
Bonds, Tax-Exempt Governmental: Aaron Barnes	This annual study provides information on Governmental bond issues by type of property financed, size of face amount, and State.	2012	December 2012	March 2013	N/A	N/A	July 2014

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Bonds, Tax-Exempt Private Activity: Aaron Barnes	This annual study provides information on private activity bond issues by type of property financed, size of face amount, and State.	2012	December 2012	March 2013	N/A	N/A	July 2014
Bonds, Tax Credit: Aaron Barnes	This annual study provides information on Tax Credit bonds and Specified Tax Credit bonds by bond program, size of face amount, and State.	2012	December 2012	March 2013	N/A	N/A	July 2014
Bonds, Credit Payments: Aaron Barnes	This annual study provides information on credit payments to issuers of qualified bonds by bond program, size of face amount, and State.	2012	December 2012	March 2013	N/A	N/A	July 2014
Tax-Exempt Organizations (Except Private Foundations): 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.	2011	November 2012	April 2013	October 2013	December 2013	July 2014
Tax-Exempt Organizations (Private Foundations): Cynthia Belmonte	This annual study provides balance sheet and income statement data for domestic private foundations and charitable trusts filing a Form 990-PF.	2011	November 2012	April 2013	October 2013	December 2013	July 2014
Individuals, Complete Report Tabulations: Michael Parisi; 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.	2012	December 2012	April 2013	October 2013	December 2013	August 2014
Individuals, Nonfarm Sole Proprietorships: Adrian Dungan	Basic data, produced annually, cover business receipts, deductions, and net income reported on Schedule C, <i>Profit or Loss From Business</i> , for nonfarm proprietors, classified by industry group.	2012	December 2012	April 2013	October 2013	December 2013	August 2014
SOI Bulletin: Wayne Kei	Summer Issue	2014	N/A	N/A	N/A	N/A	August 2014

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Estate Tax, Nonresident Alien: Joseph Newcomb	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.	2013	N/A	N/A	N/A	December 2013	August 2014
Individuals, Mid-July Filing Season Statistics: 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.	2014	December 2014	N/A	N/A	N/A	August 2014
Corporations, Foreign Tax Credit: Scott Luttrell; Lissa Costa; 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.	2011	June 2012	September 2012	March 2013	June 2013	August 2014
Individual Public Use File (PUF): Victoria Bryant	A microdata file produced annually from a sample of individual income tax returns filed with the IRS for use by researchers and analysts to examine issues in economics and public policy.	2009	December 2009	April 2010	October 2010	December 2010	September 2014
Individuals, Withholding on Foreign Recipients of U.S. Income: 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.	2012	December 2012	March 2013	April 2013	March 2014	September 2014
Individuals, Income Tax Percentile Tabulations: Michael Parisi	This annual study provides data on income and tax distribution for all nondependent individual income tax returns by percentiles.	2012	December 2012	April 2013	October 2013	December 2013	October 2014
Estate Tax: Brian Raub	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).	2013	N/A	N/A	N/A	December 2013	October 2014
Gift Tax: 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.	2013	N/A	N/A	N/A	December 2013	October 2014

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Tax-Exempt Organizations, Unrelated Business Income: Jael Jackson	This annual study provides data on unrelated business income and deductions for organizations classified as tax exempt under the Internal Revenue Code.	2011	November 2012	April 2013	October 2013	December 2013	October 2014
Trusts (and Estates), Income Tax : 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.	2013	N/A	N/A	N/A	December 2013	October 2014
SOI Bulletin: Wayne Kei	Fall Issue	2014	N/A	N/A	N/A	N/A	November 2014
Individuals, Mid-November Filing Season Statistics: 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.	2014	December 2014	N/A	N/A	N/A	December 2014