



Statistics of Income

Projects & Contacts

By Release Date

2014

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Statistics of Income Projects and Contacts: Calendar Year 2014 Releases

| Date of Public Release | Project Name and Contact | Program | Program Year | End of Tax Year | Close of Filing Period— | | Close of Sampling Period |
|------------------------|---|--|--------------|-----------------|-------------------------|-------------------------|--------------------------|
| | | | | | Regular | With Extensions of Time | |
| January 2014 | 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 |
| February 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 deduction claimed on Form 8283, Noncash Charitable Contributions. | 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 |
| March 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 |

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| 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 |
| May 2014 | 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 |
| June 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 non taxable returns (HINTs) and the reason for nontaxability. Tables are provided annually to OTA. An annual Bulletin 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 |

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| July 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 | 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 |

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| August 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, Profit or Loss From Business, 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 | 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 |
| September 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 |

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| 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 |
| October 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 | 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 |
| November 2014 | SOI Bulletin Wayne Kei | Fall Issue | 2014 | N/A | N/A | N/A | N/A |

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| December 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 |