

Program Name	Program Content and Frequency	Program Year	End of Tax Year	Close of Filing Period	Close of Filing with Extensions	Close of Sampling Period	Date of Public Release
Bonds, Tax-Exempt Governmental and Private Activity	These annual studies provide information on Governmental and private activity bonds by items such as size of face amount, State, and type of property financed. Data for Tax Year 2016 are based on returns filed through March 2017.	2016	12/31/2016	3/15/2017			9/27/2018
Corporations, Complete Report Tabulations, Publication 16	This annual report provides comprehensive data on corporation income tax returns classified chiefly by industry groups and form type. Data are from returns with accounting periods ended July 2014 through June 2015. Release date is pending a review of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2014	6/30/2015	9/15/2015	3/15/2016	6/30/2016	Pending
Corporations, Corporation Depreciation	This table is updated annually and provides data reported by corporations on Form 4562, "Depreciation and Amortization," and classified by industrial sector. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2014	6/30/2015	9/15/2015	3/15/2016	6/30/2016	Pending
Corporations, Corporation Depreciation	This table is updated annually and provides data reported by corporations on Form 4562, "Depreciation and Amortization," and classified by industrial sector. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	Pending
Corporations, Corporation Income Tax Returns Complete Report, Publication 16	This annual publication provides statistics from the Form 1120 series pertaining to income, deductions, assets, liabilities, and tax reported on corporation income tax returns. Classifications are by industry, form type, size of total assets, and size of business receipts. Separate tabulations from the Form 1120S, "U.S. Income Tax Return for an S Corporation," are also included. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2014	6/30/2015	9/15/2015	3/15/2016	6/30/2016	Pending
Corporations, Corporation Income Tax Returns Complete Report, Publication 16	This annual publication provides statistics from the Form 1120 series pertaining to income, deductions, assets, liabilities, and tax reported on corporation income tax returns. Classifications are by industry, form type, size of total assets, and size of business receipts. Separate tabulations from the Form 1120S, "U.S. Income Tax Return for an S Corporation," are also included. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	Pending
Corporations, Corporation Research Credit	These tables are updated annually and provide data reported by corporations on the Form 6765, "Credit for Increasing Research Activities." Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2014	6/30/2015	9/15/2015	3/15/2016	6/30/2016	Pending
Corporations, Corporation Research Credit	These tables are updated annually and provide data reported by corporations on the Form 6765, "Credit for Increasing Research Activities." Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	Pending
Corporations, Foreign Tax Credit	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.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	10/25/2018
Corporations, Foreign-Controlled Domestic	The Tax Year 2015 study covers domestic corporations with 50-percent-or-more stock ownership by a single foreign "person." It covers balance sheet, income statement, and tax-related data, which are classified by industry group, country, and size and age of the corporations. Data, from returns filed through June 2017, are compared to those for other domestic corporations.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	9/13/2018
Corporations, Income Tax Returns Line Item Estimates, Publication 5108	This annual publication contains estimates of frequencies of taxpayer entries and estimates of monetary amounts recorded on the applicable lines of the forms and schedules filed as part of corporation tax returns. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2014	6/30/2015	9/15/2015	3/15/2016	6/30/2016	Pending

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Corporations, Income Tax Returns Line Item Estimates, Publication 5108	This annual publication contains estimates of frequencies of taxpayer entries and estimates of monetary amounts recorded on the applicable lines of the forms and schedules filed as part of corporation tax returns. Release date is pending a review of the content of all SOI corporate publications in accordance with recently revised IRS disclosure guidelines.	2015	6/30/2016	9/15/2016	3/15/2017	6/30/2017	Pending
Corporations, International Boycott Report	The Tax Year 2014 study includes data related to unsanctioned international boycotts from corporations and partnerships and other entities as reported on Form 5713.	2016	12/31/2016	4/15/2017	9/15/2017	6/30/2018	10/31/2018
Corporations, Multi-National Enterprise (Form 8975/8975 Schedule A) Study	Forms 8975 and 8975, Schedule A, are used by U.S. corporations to report certain information with respect to the filer’s multi-national enterprise (MNE) group on a country-by-country basis. The filer reports the U.S. MNE group’s business entities, indicating each entity’s tax jurisdiction, country of organization, main business activity, and selected financial information for each tax jurisdiction in which the U.S. MNE does business. SOI conducts this study annually.	2016	6/30/2017	9/15/2017	3/15/2018	6/30/2018	12/26/2018
Excise Taxes	Data provided are by fiscal year for excise taxes levied on the manufacture, sale, or consumption of commodities as well as certain activities. Affordable Care Act (ACA) taxes and fees are included beginning with Fiscal Year 2010, depending upon the provision. The data include amounts reported to or collected by the Internal Revenue Service, the Alcohol and Tobacco Tax and Trade Bureau, and the Customs Service.	2017					7/31/2018
Heavy Highway Vehicles Use Tax Return, Calendar Years 2014-2018 (Q3 Release)	Data presented include the number of electronically filed Form 2290 (Heavy Highway Vehicles Use Tax Return) by month at the National level.	2018					7/24/2018
Heavy Highway Vehicles Use Tax Return, Calendar Years 2014-2018 (Q4 Release)	Data presented include the number of electronically filed Form 2290 (Heavy Highway Vehicles Use Tax Return) by month at the National level.	2018					10/20/2018
Individuals, Advance Data	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 September 2017 weighted up to represent a full year of data.	2016	12/1/2015	4/1/2016	10/1/2016	9/1/2017	2/27/2018
Individuals, Complete Report File	This annual study provides information on income, deductions, taxes, and credits reported on individual income tax returns and associated schedules. Data are from returns filed through December 2017.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, Complete Report Tabulations, Publication 1304	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. Data for the Tax Year 2016 study are from returns filed through December 2017.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, County Data	County data are available annually. The latest data are from returns filed through December 2016.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, Estate Tax	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).	2017				12/31/2017	10/9/2018
Individuals, Foreign Person’s Real Property Tax	This annual study provides data on distributions of U.S. real property interests by foreign persons. Data for the Tax Year 2014 study are from returns filed through January 2015.	2016	12/31/2016	1/31/2017	1/31/2017	1/31/2017	7/24/2018
Individuals, Form W-2 Tabulations	This program provides statistical tables on individual income taxpayers with amounts found on Form W-2, "Wage and Tax Statement." The statistical tables provide detailed information about individual wages, tax withholding, elective deferral contributions, and retirement plan participation. Current statistical tables have been categorized into four main areas: Wage Statistics; Elective Retirement Contribution Statistics; Retirement Plan Indicator Statistics; and Summary Statistics.	2014	12/31/2014	4/15/2015	10/15/2015	12/31/2015	2/27/2018
Individuals, Gift Tax	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.	2015				12/31/2015	1/31/2018
Individuals, Gift Tax	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.	2016				12/31/2016	1/31/2018

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Individuals, Gift Tax	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.	2017				12/31/2017	11/20/2018
Individuals, High-Income Returns Study	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	2015	12/31/2015	4/15/2016	10/15/2016	12/31/2016	6/26/2018
Individuals, Income Tax Percentile Tabulations	This annual study provides data on income and tax distributions for all nondependent individual income tax returns by percentiles. Data for the Tax Year 2016 study are from returns filed through December 2017.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	10/9/2018
Individuals, Individual Retirement Arrangement (IRA) Information	This annual study provides data detailing the total fair market value for IRAs, the number of taxpayers receiving distributions, and total contributions made to the various types of IRAs. Data for the study are from matched samples of individual income tax returns (Forms 1040), IRA contribution information (Forms 5498), and distributions from IRAs (Forms 1099-R) filed.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	10/30/2018
Individuals, Metropolitan and Micropolitan Data	This study provides detailed tabulations of individual income tax return data at the metropolitan and micropolitan statistical area level. Data are classified by size of adjusted gross income.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, Mid-May Filing Season Statistics	This report, published two times per year, includes number of returns, total income, total tax, and share of income composed of capital gains, by AGI category. Data for the May report are based on returns processed through week 20 of the filing season.	2017					6/26/2018
Individuals, Mid-July Filing Season Statistics	This report, published three times per year, includes number of returns, total income, total tax, and share of income composed of capital gains, by AGI category. Data for the November report are based on returns processed through week 30 of the filing season.	2016					Pending
Individuals, Mid-November Filing Season Statistics	This report, published two times per year, includes number of returns, total income, total tax, and share of income composed of capital gains, by AGI category. Data for the November report are based on returns processed through week 47 of the filing season.	2017					12/18/2018
Individuals, Migration Flow Data	The annual Migration Flow study (based on year-to-year changes in individual tax return addresses) provides data on the number of returns, number of exemptions, and aggregate adjusted gross income at the State and county level. The most recent study is based on data from returns filed	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	10/31/2018
Individuals, Noncash Charitable Contributions	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. Data are from returns filed through December 2016.	2016					6/27/2018
Individuals, Nonfarm Sole Proprietorships	This study, produced annually, covers business receipts, deductions, and net income reported on Schedule C, "Profit or Loss From Business," for nonfarm proprietors, classified by industry group.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, Return Line Item Estimates, Publication 4801	This annual publication contains estimates of frequencies of taxpayer entries and estimates of monetary amounts recorded on the applicable lines of the forms and schedules filed as part of individual income tax returns as shown in the Individual Complete Report. Tax Year 2016 data are based on returns filed through December 2017.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
Individuals, Withholding on Foreign Recipients of U.S. Income	This annual study provides data by country on income paid to nonresident aliens and the amount of tax withheld for the U.S. Government. Data are from returns filed through March 2016.	2016	12/31/2016	3/15/2017	4/15/2017	3/30/2017	10/25/2018
Individuals, ZIP Code Data	This study provides detailed tabulations of individual income tax return data at the State and ZIP code level. Data for the Tax Year 2014 study are from returns filed through December 2015.	2016	12/31/2016	4/15/2017	10/15/2017	12/31/2017	8/30/2018
IRS Data Book, Publication 55B	This report describes activities conducted by the Internal Revenue Service during Fiscal Year 2017 (October 1, 2016, through September 30, 2017). It provides information on returns filed and taxes collected, enforcement, taxpayer assistance, the IRS budget and workforce, and other selected activities.	2017					3/29/2018
IRS Research Bulletin, Publication 1500	This report features selected papers from the annual IRS-Tax Policy Center Research Conference. Papers include the latest trends and research findings from all areas of the IRS, officials from other government agencies, and academic and private sector experts on tax policy, tax administration, and tax compliance.	2017					5/9/2018
Partnerships, Income	Based on the record information it collected, perfected, and analyzed from the sample of TY 2016 partnership returns, SOI produces text, figures, tables, and statistics for publication in the SOI Bulletin and on the IRS Tax Stats Web site.	2016	12/31/2016	4/15/2017	9/15/2017	12/31/2017	1/31/2019

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Partnerships, Return Line Item Estimates, Publication 5035	Based on the annual SOI partnership sample, Publication 5035 presents population estimates of the frequencies of entries and population estimates of the dollar amounts that taxpayers record on the lines of the partnership forms and schedules.	2016	12/31/2016	4/15/2017	9/30/2017	12/31/2017	1/31/2019
Partnerships, Withholding on Foreign Recipients of U.S. Income	The Tax Year 2014 study provides data from returns filed through September 2015 on U.S. partnership payments to foreign partners. Data are classified by country and recipient type.	2016	12/31/2016	4/15/2017	9/15/2017	9/30/2017	6/26/2018
Program Documentation: Data Items by Forms and Schedules, Document 6991	This document contains the Federal tax forms, schedules, and information documents that each of the subject-matter branches of SOI has selected for its tax year programs.	2017					10/16/2018
Projections, Publication 6149	This annual publication contains calendar year return projections by State.	2018					12/20/2018
Projections, Publication 6186	This annual publication contains calendar year return projections for the U.S. and IRS Campuses.	2018					11/6/2018
Projections, Publication 6187	This annual publication contains calendar year projections of individual returns by major processing categories.	2018					10/23/2018
Projections, Publication 6292, Fall Issue	This semi-annual publication contains fiscal year return projections for the United States.	2018					9/25/2018
Projections, Publication 6292, Spring Issue	This semi-annual publication contains fiscal year return projections for the United States.	2018					6/26/2018
Projections, Publication 6961	This annual publication contains calendar year projections of information and withholding documents.	2018					8/21/2018
SOI Bulletin, Publication 1136, Fall Issue	This quarterly report contains the earliest published financial statistics obtained from the various types of tax and information returns filed.	2018					11/29/2018
SOI Bulletin, Publication 1136, Spring Issue	This quarterly report contains the earliest published financial statistics obtained from the various types of tax and information returns filed.	2018					5/29/2018
SOI Bulletin, Publication 1136, Summer Issue	This quarterly report contains the earliest published financial statistics obtained from the various types of tax and information returns filed.	2018					8/30/2018
SOI Bulletin, Publication 1136, Winter Issue	This quarterly report contains the earliest published financial statistics obtained from the various types of tax and information returns filed.	2018					2/27/2018
Tax-Exempt Organizations (Except Private Foundations)	This annual study provides balance sheet and income statement data for organizations classified as	2015	11/30/2016	4/15/2017	10/15/2017	12/31/2017	7/26/2018
Tax-Exempt Organizations (Private Foundations)	This annual study provides balance sheet and income statement data for domestic private foundations and charitable trusts filing a Form 990-PF. The Tax Year 2015 study is based on data	2015	11/30/2016	4/15/2017	10/15/2017	12/31/2017	8/31/2018
Tax-Exempt Organizations, Annual Financial Extracts	The Processing Year 2017 extract files contain selected financial data collected for program administrative purposes from the population of tax-exempt organization information returns.	2017					5/24/2018
Tax-Exempt Organizations, Excise Taxes	This program provides filing year data on taxes on prohibited activities reported by private foundations, charities, and split-interest trusts Error-corrected data, derived from the Business Returns Transaction file, are extracted for the entire calendar year, regardless of the tax year	2017	11/30/2016	4/15/2017	12/31/2017	10/15/2017	7/26/2018