## **Examination Timeline** Taxpayer Name Year(s) TRUMP, DONALD J & MELANIA December 31, 2015 Revenue Agent Name Revenue Agent Signature Date 06/04/2019 Approving Team Manager Name Approving Team Manager Signature Date 06/11/2019 Date Activities Comments/Plan Actions 06/13/2019 Opening conference 06/13/2019 Examination plan issued 07/13/2019 Last day to file informal claims 08/31/2019 Last day to issue IDRs 09/30/2019 Last day to respond to IDRs 12/31/2019 Last day to issue Forms 5701 02/29/2020 RAR issued (unagreed, agreed, or partially agreed clo 04/30/2020 30-Day Letter protest due 05/31/2020 Protest rebuttal complete 06/30/2020 Case closed from team

## Instructions

The activities listed above can be customized to fit the unique needs of each examination. The activity field of each line includes a drop down box listing many common examination milestones. Examiners can select a milestone from the list or create a unique activity by typing in a description for any milestone not included in the list. Lines for additional activities can be inserted by clicking on the gray "+" to the right of each activity line. To delete an activity, click on the gray "X" at the right of the applicable line. To move an activity up, click the grey "\[\Delta\]" at the right of the applicable line until you have moved it to is new location. To move an activity down, click the grey "\[\Delta\]" at the right of the applicable line until you have moved it to is new location. Note the move functions will only move up or down one line at a time.

Target dates for each listed activity should be established based on the complexity of issues identified for examination, collaboration with team members, and LB&l's professional examination goals and objectives. The timeline established above should be adjusted as needed while the examination progresses. See IRM 4.46.3.8.1.1 for additional factors to consider when developing the case timeline and estimated closing date.

## **Examination Timeline**

Taxpayer Name Yea			Year(s	s)	
TRUMP, DONALD J & MELANIA		201712			
Revenue Agent Name		Revenue Agent Signature		t Signature	Date 08/23/2021
Approving Team Manager Name		Approving Team Manager Signature		Date	
Date	Activities			Comments/Plan Actions	
04/19/2021	Opening conference				
05/19/2021	Last day to file informal claims				
09/01/2021	Examination plan issued				, , , , , , , , , , , , , , , , , , , ,
01/31/2022	Last day to issue IDRs				
02/28/2022	Last day to respond to IDRs				
03/31/2022	Last day to issue Forms 5701				
04/29/2022	Last day to respond to Forms 5701				
05/31/2022	RAR issued (unagreed, agreed, or partially agreed closure)		re)		
05/31/2022	Closing conference				
06/30/2022	Request Statute of Limitations Extension - Agreed Case			Agreed / No change TEFRA case (Taxpyer is a partner in a related TEFRA case, DJTH LLC) must have at least 12 months (365 days) remaining. I.R.M. 25.6.23.7.1.	
06/30/2022	Request Extension of Statute of Limitations - Unagreed			Unagreed TEFRA cases, (Taxpayer is a partner in a related TEFRA case, DJTH LLC) must have at lest 20 months (600 days) remaining at the time the case is received in Technical Services. I.R.M. 25.6.23.7.1	
07/29/2022	30-Day Letter issued (unagreed or partially agreed closure)		re)	L-950-Z to be issued.	
08/31/2022	30-Day Letter protest due			L-950-Z allows 30-days for the taxp[ayer to file a written protest.	
09/30/2022	Protest rebuttal complete				
09/30/2022	Estimated Closure Date (ECD - Status 80 or above)				

## Instructions

Target dates for each listed activity should be established based on the complexity of issues identified for examination, collaboration with team members, and LB&I's professional examination goals and objectives. The timeline established above should be adjusted as needed while the examination progresses. See IRM 4.46.3.8.1.1 for additional factors to consider when developing the case timeline and estimated closing date.