

**UNITED STATES COURT OF APPEALS FOR THE FOURTH CIRCUIT  
DOCKETING STATEMENT ON APPEAL FROM TAX COURT**

**Directions:** Counsel must make a **docketing statement filed** entry in CM/ECF within 14 days of filing a notice of appeal or cross-appeal, or within the due date set by the clerk's docketing notice, whichever is later. If opposing counsel finds the docketing statement inaccurate or incomplete, opposing counsel may file any objections using the **docketing statement objection/correction filed** entry within 7 days of service of the docketing statement. Appellants proceeding pro se are not required to file a docketing statement.

**Caption of Case**      **Fourth Circuit Docket No. (if known)** \_\_\_\_\_

v.

Tax Court Docket Number \_\_\_\_\_ Judge \_\_\_\_\_

Statute or other authority establishing jurisdiction in the:

Tax Court \_\_\_\_\_

Court of Appeals \_\_\_\_\_

A. Timeliness of Appeal

1. Date of entry of judgment or order appealed from \_\_\_\_\_

2. Date this notice of appeal filed \_\_\_\_\_

If cross appeal, date first notice of appeal filed \_\_\_\_\_

B. Finality of Order or Judgment

1. Is the order or judgment appealed from a final decision on the merits? Yes [ ] No [ ]

2. If no, Is the order appealed from a collateral or interlocutory order reviewable under any exception to the finality rule? Yes [ ] No [ ]

If yes, explain

C. Has this case previously been appealed? Yes [ ] No [ ]

If yes, give the case name, docket number, and disposition of prior appeals below or on a separate sheet.

- D. Are any related cases or cases raising related issues pending in this Court, the Tax Court or the Supreme Court? Yes [ ] No [ ]  
If yes, cite the case and manner in which it is related below or on a separate sheet. If abeyance, consolidation, or in seriatim argument is warranted, counsel must file a separate motion seeking such relief.

If related case is pending in this Court, has it been accepted for mediation by the Office of the Circuit Mediator? Yes [ ] No [ ]

- E. State, succinctly, the nature of the suit, the relief sought and the outcome below. Attach additional page if necessary.

- F. Issues to be raised on appeal. Issues should be framed with reference to the specific facts and circumstances of the case. Although a party will not be precluded from raising additional issues in the brief, counsel should make every effort to include in the docketing statement all of the issues that will be presented to the Court. The docketing statement should not contain motions or other requests for interim relief. Attach additional page if necessary.

G. Is settlement being discussed? Yes [ ] No [ ]

The docketing statement will be used in any mediation conducted under Local Rule 33. If counsel believes a mediation conference would be beneficial, counsel may make a confidential request for mediation by contacting the Office of the Circuit Mediator directly at 843-521-4022.

H. Is expedited disposition of this case necessary? Yes [ ] No [ ]  
If yes, you must file an appropriate motion.

Is oral argument necessary? Yes [ ] No [ ]

I. List each adverse party to the appeal. Attach additional sheets if necessary. If no attorney, give address and telephone number of the adverse party.

Adverse party \_\_\_\_\_  
Attorney \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

Adverse party \_\_\_\_\_  
Attorney \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

J. List name(s) and address(es) of appellant(s) who filed this notice of appeal and appellant's counsel. Attach additional page if necessary.

Appellant(s) Name \_\_\_\_\_  
Address \_\_\_\_\_

Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

Attorney's Name \_\_\_\_\_  
Firm \_\_\_\_\_  
Address \_\_\_\_\_

Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

Will you be handling the appeal? Yes [ ] No [ ]

Use **docketing statement filed** entry in CM/ECF to file docketing statement and any pages containing extended answers.

Signature \_\_\_\_\_

Date \_\_\_\_\_

**CERTIFICATE OF SERVICE**

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I certify that on \_\_\_\_\_ I served a complete copy of this Docketing Statement on all parties, addressed as shown below:

\_\_\_\_\_  
Signature