## How to Request an IRS Tax Return Transcript

You can request an IRS Tax Return Transcript, free of charge, from the IRS in one of two ways:

- Online
- By Paper

## **Online Request**

- Visit the IRS transcript page.
- Click Get Transcript Online (If at any point, you cannot validate your identity for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by paper, see below).
- Set up an account with the IRS. They will email you a confirmation code to enter. Be sure to check your junk file in case the email is sent there.
- Enter the non-filer's Social Security number, email address, filing status, <u>account numbers</u> for loan or credit card associated with your name, and mobile phone associated with your name.
- Click Continue.
- Be sure to select **Return Transcript** and the appropriate year.
- Save the Transcript for submission to our office.
- Upload the document through our Drop-Box or submit in person.

## Paper Request Form – IRS Form 4506T-EZ

- Download an IRS Form 4506T-EZ.
- Complete lines 1-4, following the instructions on page 2 of the form.
- On line 6, indicate the tax year requesting.
- Make sure you check the box which starts with "Signatory attests that he/she has read..." otherwise the form will not be processed.
- The tax filer (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number.
- Mail or fax the complete form to the appropriate address on page 2 of the 4506T-EZ form.

How to fix address matching problems when ordering online

When entering the information into the IRS address matching system note the following:

- The address entered must match the address already on file with the IRS exactly.
- The address on file is typically the address on your most recent tax return.
- Spelling out the word "street" rather than using the abbreviation "st." can be enough to cause an error.
- Addresses on the IRS system are auto-corrected through a post office program and may not match what you put on your tax return.