

Instructions for Obtaining an IRS Return Transcript

You may **not** be able to use the IRS Data Retrieval Tool due to one of the following reasons:

- Tax return filing status is 'Married Filing Separately' or Marital status has changed since January 1, 2022
- Filed an amended tax return
- Are required to file, but have been granted an extension by the IRS.
- Filed a Puerto Rican or foreign tax return – you will need to submit a signed copy of your tax return
- Are victims of IRS tax-related identity theft. Submit the following:
 - Signed statement that you are a victim tax-related identity and are aware of the matter.
 - Copy of the Tax Return Data Base view from the IRS

www.irs.gov/transcript: You may be requested to submit an from the IRS to our office or our verification partner, Inceptia.

- You may access a PDF version of the required documents through the [IRS website](https://www.irs.gov/Individuals/Get-Transcript) (www.irs.gov/Individuals/Get-Transcript). If you have never filed a tax return, you will need to use one of the other methods to get a W-2 transcript or statement of non-filing. To access your records you will need:
 - A non-prepaid cell phone in your name
 - To have had a credit card, car loan, home loan, or another bank loan to prove identity
- Transcripts can be ordered using the Get Transcript by Mail service.
 1. Call the IRS at 1-800-908-9946 (on the automated menu):
 2. Enter and verify your Social Security Number
 3. Enter in your street address number
 4. Select Option #2 to request a Return Transcript
 5. Enter and verify the year of your needed Return Transcript (for a 2023-24 verification, request the 2021 tax year)
- You may complete Form 4506T: *Request for Transcript of Tax Return*, and mail it or fax it to the address/phone number indicated on the form. To request a Return Transcript check **box 6a**. Requesting a Return Transcript is free of charge. You can print this form from the [IRS forms page](https://www.irs.gov/pub/irs-pdf/f4506t.pdf) (https://www.irs.gov/pub/irs-pdf/f4506t.pdf).
To contact the IRS for general questions call 1-800-829-1040 or visit the [IRS website](https://www.irs.gov) (www.irs.gov).

Please note the transcripts have similar names.

IRS Tax Return Transcripts is the original tax return

Record of Account is the original tax return and the amended tax return

Account Transcript is the amended tax return summary

Wage and Income Transcript is the W2s and any other income forms such as 1099, 1098