

Verification of 2016 Income

Information for Individuals with Unusual Circumstances & How to Order IRS Tax Return Transcripts

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2016 IRS income tax return and has been granted a filing extension by the IRS, must provide:

- ▶ A copy of IRS Form 4868, “Application for Automatic Extension of Time to File U.S. Individual Income Tax Return,” that was filed with the IRS for tax year 2016; and
- ▶ A copy of the IRS’s approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing time for tax year 2016; and
- ▶ Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2017; and
- ▶ A copy of IRS Form W–2 for each source of employment income received for tax year 2016 and,
- ▶ If self-employed, a signed statement certifying the amount of the individual’s Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2016.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2016 must provide:

- ▶ A 2016 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- ▶ A signed copy of the 2016 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- ▶ A Tax Return DataBase View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- ▶ A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft.

A 2016 IRS Tax Return Transcript may be obtained through:

- ▶ **Get Transcript by MAIL**
Go to www.irs.gov. Under the Tools heading on the IRS homepage, click “Get a Tax Transcript by Mail”. Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript”.
- ▶ **Get Transcript ONLINE**
Go to www.irs.gov. Under the Tools heading on the IRS homepage, click “Get a Tax Transcript Online”. Make sure to request the “IRS Tax Return Transcript” and **NOT** the “IRS Tax Account Transcript”.
- ▶ **To request by phone**
Call 1-800-908-9946. Make sure to request the “IRS tax return transcript” and not the “IRS tax account transcript.”
- ▶ **TRDBV Request**
Call the IRS Identity Protection Specialized Unit at 1-800-908-4490.

NOTE: When ordering tax return transcripts, you will be asked to provide the name and SSN or TIN that was listed first on the tax return, as well as the address listed on the tax return when submitted.