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10 TIPS TO GET YOUR PRIOR TAX DATA FROM THE IRS

By Victor Sy, CPA

Here are 10 tips to obtain your federal tax return information from the IRS:

1. You may get a [transcript](#) of your account from the IRS. There is no charge for transcripts for the current tax year and the past three tax years.
2. A tax return transcript shows [most line items from your tax return as it was originally filed](#), including any accompanying forms and schedules. It does not reflect any changes made after the return was filed.
3. A tax account transcript shows any later adjustments either you or the IRS made after the tax return was filed. This transcript shows [basic data](#) – including marital status, type of return filed, adjusted gross income and taxable income.
4. There are three options for obtaining free copies of your federal tax return information:
 - [Web](#)
 - [Telephone](#)
 - [Mail](#).
5. [Web](#): To request either transcript online, go to <http://www.irs.gov> and look for our new online tool called Order a Transcript.
6. [Telephone](#): To order by phone, [call 800-908-9946](tel:800-908-9946) and follow the prompts in the recorded message.
7. [Mail](#): To request a 1040, 1040A or 1040EZ tax return transcript through the [mail](#), complete IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript. Businesses, partnerships and individuals who need transcript information from other forms or need a tax account transcript must use the Form 4506T, Request for Transcript of Tax Return.
8. If you order online or by [phone](#), you should receive your tax return transcript within 5 to 10 days from the time the IRS receives your request. Allow 30 calendar days for delivery of a tax account transcript if you order by mail using Form 4506T or Form 4506T-EZ. If you still need an [actual copy](#) of a previously processed tax return, it will cost \$57 for each tax year that you order.
9. Complete [Form 4506](#), Request for Copy of Tax Return, and mail it to the IRS address listed on the form for your area. Copies are generally available for the current year as well as the past six years. Please allow 60 days for actual copies of your return.
Memo: Does this form number look familiar? It's the same form that banks and loan agents have you sign when applying for a loan so they can get a copy of your tax return directly from the IRS. There's trouble if what you submitted to the bank does not match what was filed with the IRS.
10. Visit www.irs.gov or call the IRS forms and publications order line at 800-TAX-FORM ([800-829-3676](tel:800-829-3676)).