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HOW TO OBTAIN YOUR TRANSCRIPTS OF RECORDS FROM THE IRS

By Victor Sy, CPA

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

1. You may obtain [free copies](#) of your federal tax return information for either tax return transcripts or tax account transcripts.
2. You may obtain copies for the current year and the [past three years](#).
3. 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 you, your representative or the IRS made after the return was filed. In many cases, a return transcript will meet the requirements of lending institutions, such as those offering mortgages and student loans.
4. 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.
5. To request either transcript by phone, call [800-908-9946](#). You will need to follow prompts in the recorded message. You'll also need one virtue that people admire you for - patience.
6. To request a tax return transcript through the mail, complete [IRS Form 4506T-EZ](#), Short Form Request for Individual Tax Return Transcript. Form 4506T-EZ is only for individuals who filed a Form 1040 series return. 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.
7. You should receive your tax return transcript within 10 working days (that's what the IRS says) from the time the IRS receives your request. Allow 30 calendar days for delivery of a tax account transcript.
8. If you need an [actual copy of your tax return](#), it will cost \$57 per tax year and take much longer time. Complete Form [4506](#), Request for Copy of Tax Form, and mail it to the IRS address listed on the form for your area. Allow 60 days for actual copies of your return to arrive. The IRS keeps copies of your actual for seven years from date of filing.
9. You can also request your [accountant or tax preparer](#) who has access to the IRS e-service to download your transcript. You will need to sign a Power of Attorney (POA Form 2848).
10. You may also visit the [IRS website](#) at www.irs.gov to determine which form will meet your needs. Forms 4506, 4506T and 4506T-EZ can be found at IRS.gov or by calling the IRS forms and publications order line at 800-TAX-FORM (800-829-3676).