

Sample article for organizations to use to reach customers

Customize and provide the following article in your communication vehicles with new information on requesting tax returns or tax return transcripts

Applying for college financial aid or preparing to buy a home and need copies of tax returns or tax return transcripts? Here's a little help.

Proper planning and organization can make your road to college or home-buying easier. If you are considering financial aid to help defray school costs, or if you are applying for a bank loan, you will likely need a copy of your tax transcript.

High school seniors who plan to attend college, or current students who plan to continue their college studies, must fill out a Free Application for Federal Student Aid to determine if they're eligible to receive financial aid. Part of this application process is providing a transcript of your federal tax return information. Most financial institutions also require copies of tax returns for the mortgage loan application process.

There are two quick and easy options to request copies of your tax return transcripts and tax account transcripts — by phone and by mail.

To request your free transcripts, call **1-800-908-9946** toll free and follow the prompts in the recorded message. You should receive your transcript in one to two weeks. You may also complete [IRS Form 4506T](#), *Request for Transcript of Tax Return*, and mail it to the address listed in the instructions. Most requests are processed within 30 days, when requested by mail. You can get a copy of Form 4506T by visiting our website at **www.irs.gov**.

Definitions

A **tax return transcript** shows most line items from your filed Form 1040, 1040A or 1040EZ, including any attached forms and schedules. It does not reflect 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 that offer student loans and mortgages.

A **tax account transcript** shows any adjustments either you or the IRS made after your tax return was filed. This transcript also shows basic data, including marital status, type of return filed, adjusted gross income and taxable income.

Other Information

If you need an exact copy of a previously filed and processed tax return and any attachments (including Form W-2), please complete [Form 4506](#), *Request for Copy of Tax Return*, and mail it to the address listed in the instructions, along with a \$57.00 fee for each tax year requested.

Make the check or money order for the fee payable to the United States Treasury. Copies are generally available for recently filed returns and for returns filed within the past six years. Either spouse may request copies of jointly filed tax returns, or only one signature is required. Allow up to 60 calendar days to receive your copies. The form and related information are available on the IRS.gov.

NOTE TO EDITOR: Below are helpful resources on IRS.gov.

- [Form 4506T-EZ](#), *Short Form Request for Individual Tax Return Transcript*
- [Form 4506-T](#), *Request for Transcript of Tax Return*
- [Form 4506](#), *Request for Copy of Tax Return*