

Getting Your Taxes Done – Obtaining Prior Year Returns, Transcripts and Social Security Numbers

If you are a natural disaster victim, one of the most significant challenges you may face is reconstructing your lost tax records from prior years or replacing your (or your children's) social security cards. Here are some tips that will help you secure the necessary replacement documents needed to file your tax return.

Securing Copies of Prior Year Returns or Tax Return Transcripts

If your tax records have been lost or damaged and/or your employers can not be located, you can obtain copies of your prior tax returns or a transcript from the IRS. The IRS may waive all fees related to securing these documents if your main home, principal place of business, or tax records are located in a Presidentially declared disaster area but the process does take time to complete – so get started as soon as possible! Here are three ways to get the information you need:

- Visit the IRS website, www.irs.gov, to download copies of Form 4506 and/or Form 4506-T, Request for Transcript of Tax Return. Write the assigned disaster designation (for example, “Hurricane Katrina”) in red across the form to avoid any charges and mail to the address given. Allow two weeks for delivery.
- Call the IRS special Natural Disaster Hotline at 1-866-562-5227. Specialists can order a transcript for you.
- Visit your nearest IRS Taxpayer Assistance Center.

Obtaining Social Security Numbers for You and Your Dependents

It is extremely important that each person has and uses their correct Social Security Number. Failure to have all Social Security Numbers (yours, your spouse, dependents, etc.) can result in an inability to file your tax return and/or result in a delay in the processing of refunds.

The Social Security Administration is the key source for survivors to expedite issuance of replacement cards. But proof of your identity will be required. Documents that contain your name and biological information (such as birth date) or photo identification are preferred. You must submit Form SS-5, Social Security Number Application, which can be obtained at your local Social Security Administration office or on the SSA website at <http://www.ssa.gov/online/ss-5.pdf>. The Social Security Administration can also provide you with a Social Security Number verification letter which can be used for identification purposes until your new Social Security Card is received.



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