

PLEASE NOTE: These forms must be completed properly! If the form has text that is scribbled or crossed out, the IRS will not process the request. If you white-out sections, the IRS will not process the request. If you do not sign the form, include the proper address information, do not mark the “signatory attests” box, or do not send the form to the proper fax/address, the IRS will not process the request.

Please review the list of missing information we provided for you to determine which document(s) you need to request. Student information: the STUDENT needs to complete a request. Spouse information (if filed separately or requesting Nonfiling Letter or W2 information): the SPOUSE needs to complete a request. Parent information: the PARENT needs to complete a request. If parents filed separately, or if requesting Nonfiling Letter or W2 information, BOTH parents (if applicable) need to complete a request.

INSTRUCTIONS to Request a TAX RETURN TRANSCRIPT

- Line 1a, 1b, 3, 4: Please complete
- Line 2a, 2b: If you filed a joint return, please complete
- Line 5a: This has been completed with our information so it can be sent directly to us. If you do not want the transcript to be sent directly to us, please edit this information prior to printing/signing. If the transcript is not sent directly to us, the person whose information is listed on the document will need to sign the document before submitting the information to our office.
- Line 6: Please enter the appropriate tax year for which you are requesting information
- Don't forget to complete the “Signature of taxpayer(s)” section (you need to print the form for an ink signature)
- You can fax and mail (information is listed on the last page) this on your own, or we would be happy to fax/mail it for you if you submit the original document to our office (in-person/mail)

INSTRUCTIONS to Request a WAGE and INCOME STATEMENT

- Line 1a, 1b, 3, 4: Please complete
- Line 2a, 2b: Complete if applicable
- Line 5: This has been completed with our information so it can be sent directly to us. If you do not want the statement to be sent directly to us, please edit this information prior to printing/signing. If the statement is not sent directly to us, the person whose information is listed on the document will need to sign the document before submitting the information to our office.
- Line 6: Enter tax form number if you would like to request a Tax Return Transcript in addition to W2 information
- Line 6a: Check-mark if you would like to request a Tax Return Transcript in addition to your W-2 information
- Line 8: This has been check-marked to request W-2 information
- Line 9: Please enter the appropriate tax year for which you are requesting information
- Don't forget to complete the “Signature of taxpayer(s)” section (you need to print the form for an ink signature)
- You can fax and mail (information is listed on the last page) this on your own, or we would be happy to fax/mail it for you if you submit the original document to our office (in-person/mail)

INSTRUCTIONS to Request a VERIFICATION of NONFILING LETTER

- Line 1a, 1b, 3, 4: Please complete
- Line 5: This has been completed with our information so it can be sent directly to us. If you do not want the letter to be sent directly to us, please edit this information prior to printing/signing. If the letter is not sent directly to us, the person whose information is listed on the document will need to sign the document before submitting the information to our office.
- Line 7: This has been check-marked to request a Verification of Nonfiling Letter
- Line 9: Please enter the appropriate year for which you are requesting information
- Don't forget to complete the “Signature of taxpayer(s)” section (you need to print the form for an ink signature)
- You can fax and mail (information is listed on the last page) this on your own, or we would be happy to fax/mail it for you if you submit the original document to our office (in-person/mail)