How to pull your 2020 transcript

Use the link below to access the IRS website

WWW.IRS.GOV/individuals/get-transcript

Select Get Transcript online

Request Online

What You Need

To register and use this service, you need:

- your <u>SSN</u>, date of birth, filing status and mailing address from latest tax return,
- · access to your email account,
- your personal account number from a credit card, mortgage, home equity loan, home equity line of credit or car loan, and
- a mobile phone with your name on the account.

What You Get

- · All transcript types are available online
- · View, print or download your transcript
- · Username and password to return later

Get Transcript Online

Request by Mail

What You Need

To use this service, you need your:

- SSN or Individual Tax Identification Number (ITIN),
- · date of birth, and
- · mailing address from your latest tax return

What You Get

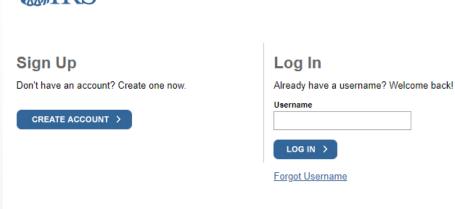
- · Return or Account transcript types delivered by mail
- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you

Get Transcript by Mail

Select: Get Transcript online

If you don't have an account create one







To register you will need the following

You will need some information about yourself to register

PTIN and FIRE users need a separate account in this system

Please have the following information and materials to complete registration:

- Full Name
- Email
- Birthdate
- Social Security Number (SSN) or Individual Tax Identification Number (ITIN)
- Tax filing status
- Current address

Do you have this information available?





You need a financial account to register

To verify your identity, we will need a number from ONE of your financial accounts. We can use any of the following:

- . Last 8 digits of Visa, Mastercard, or Discover credit card OR
- Student loan OR
- · Mortgage or home equity loan OR
- . Home equity line of credit OR
- Auto Ioan

You will only need to provide the loan account number or a few digits from a credit card number. We only use this information to verify y identity. You will not be charged any money and are not sharing any account balances or other financial information with us.

We can't verify debit cards, corporate cards, American Express, Barclays, or some cards issued by banks in U.S. territories. Additionally we can't verify student loans issued by Nelnet.

A soft inquiry will show up on your credit report to let you know that the IRS accessed your credit report information. This will not increas or decrease your credit score and lenders will not be able to see this.

Do you have this financial information available? (If you don't have the account information on hand, you should answer 'No'.)





You need a phone number or a verified address

We'll need one more way to verify your identity. The easiest way is to send a code to your phone by text message (SMS). Your phone must be a U.S.-based mobile phone number associated with your name.

You can also complete identity verification by receiving a letter in the mail. If you choose this method, you'll either need a U.S.-based phone number OR an iPhone, iPad, or Android device to complete registration.



Exit Registration

Follow the screen instructions to create your account

Select an option as your reason for needing a transcript

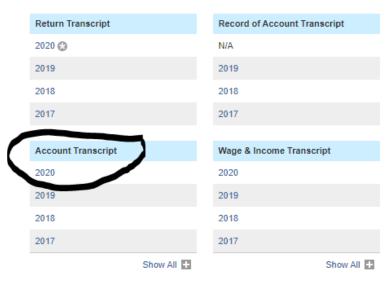
You do not need a Customer File Number

Select Go



Select Account transcript 2020

Below are the transcripts and years available.



3 Indicates the availability of a Verification of Non-Filing letter for the year.

Glossary

Return Transcript

Tax Return Transcripts show most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. This transcript does not reflect any changes you, your representative or the IRS made after you filed your return. In many cases, a Return Transcript will meet the requirements of lending institutions offering mortgages and student loans.

Record of Account Transcript Record of Account Transcripts combine the information from tax account and tax return transcripts.

Account Transcript

Tax Account Transcripts provide any adjustments either you or we made after you filed your return. This transcript shows basic data, including marital status, type of return filed, adjusted gross income and taxable income.

The following form will generate:

This Product Contains Sensitive Taxpayer Data

Request Date: 01-05-2021 Response Date: 01-05-2021 Tracking Number: XXXXXXXXXXXX

Account Transcript

FORM NUMBER: 1040 TAX PERIOD: Dec. 31, 2020

TAXPAYER IDENTIFICATION NUMBER: XXX-XX-XXXX SPOUSE TAXPAYER IDENTIFICATION NUMBER: XXX-XX-XXXX

JANE R DOE 123 st

--- ANY MINUS SIGN SHOWN BELOW SIGNIFIES A CREDIT AMOUNT ---

ACCOUNT BALANCE: 0.00

ACCRUED INTEREST: 0.00 AS OF: Jan. 18, 2021 ACCRUED PENALTY: 0.00 AS OF: Jan. 18, 2021

ACCOUNT BALANCE
PLUS ACCRUALS
(this is not a

payoff amount): 0.00

** INFORMATION FROM THE RETURN OR AS ADJUSTED **

EXEMPTIONS: 00 FILING STATUS: SINGLE

ADJUSTED GROSS INCOME: TAXABLE INCOME: TAX PER RETURN: SE TAXABLE INCOME TAXPAYER: SE TAXABLE INCOME SPOUSE: TOTAL SELF

EMPLOYMENT TAX:

RETURN NOT PRESENT FOR THIS ACCOUNT

TRANSACTIONS

CODE	EXPLANATION OF TRANSACTION No tax return filed	CYCLE	DATE	AMOUNT
766	Tax relief credit		04-27-2020	-\$600
766	Credit to your account		04-27-2020	-\$600
846	Refund issued		04-15-2020	\$1,200.00
290	Additional tax assessed 12345-999-12345-0	20201505	04-27-2020	\$0.00
971	Notice issued		04-27-2020	\$0.00
766	Tax relief credit		01-18-2021	-\$600.00
766	Credit to your account		01-18-2021	-\$600.00
846	Refund issued		01-04-2021	\$600.00
290	Additional tax assessed 12345-999-12345-0	20205302	01-18-2021	\$0.00

This Product Contains Sensitive Taxpayer Data