

Step by Step on how to pull your IRS transcript

Go To: <https://www.irs.gov/individuals/get-transcript>

- a. Click on Get Transcript Online
- b. Create an account
- c. Click Continue
- d. Yes, and Yes
- e. Continue and fill in the information
- f. Send Code
- g. Check your e-mail for the one-time code
- h. Enter the one-time code and click Continue
- i. Fill out the information and click continue
- j. Pick one of these items

Verify your financial account number

To prevent identity theft and protect the security of your tax information, you will need to verify your identity.

Provide one of the following active account numbers:

- Last 8 digits of Visa, Mastercard, or Discover credit card

(We can't verify debit cards, corporate cards, Barclays, or some cards issued by banks in U.S. territories)
- Student loan account number

(We can't verify Nelnet student loans)
- Auto loan account number
- Mortgage or home equity loan account number
- Home equity line of credit account number
- I don't have a current credit card, student loan, auto loan, home equity loan, or mortgage

By providing financial account information, I authorize the IRS to access my credit report for the purpose of verifying my identity.

CONTINUE >

- k. Send the code to your cell phone
- l. Type in code that you received
- m. Create a username and PW
- n. CONGRATULATIONS you have just made an account with the IRS
- o. Click continue
- p. Reason for Transcript: Mortgage Related
- q. Leave customer file # blank
- r. Click on Return Transcript 2019
- s. Save or print to your computer and e-mail it to me.
- t. You have now completed getting your tax return transcript