

Best Tax Practice - Transcript Requests From The IRS - TAX RETURN TRANSCRIPT

The IRS has various types of TRANSCRIPTS.

For more information go to: <http://www.irs.gov/Individuals/Tax-Return-Transcript-Types-and-Ways-to-Order-Them>

The IRS suggests taxpayers to keep a (digital or paper) copy of their tax returns for their own records, as there can be life events for which information from the filed tax return is needed. A very common example of this includes

- College financial aid applications (FAFSA)
- Home loan applications
- Business loan applications

Sometimes the requesting entity (college, bank, etc.) will want a copy of your tax return. When one requests a “copy of your tax return,” they usually want a copy of the FILED 1040 federal tax return; the FILING COPY.

Your CLIENT COPY of the tax return you received from your preparer could be more than 100 pages as that CLIENT COPY includes pages of worksheets, state returns and other information that is not part of the FILING COPY – the copy of the information actually sent to the IRS. Those worksheets and other sheets are NOT part of the FILED tax return.

It is not required nor is it suggested that you give the requestor a copy of your CLIENT COPY provided you by your preparer. Ask your preparer what information you should provide the requestor or ask your preparer for a FILING COPY of the tax return which are just those pages that were actually filed with the IRS.

If necessary, your tax return transcript is available to you from the IRS.

- The quickest way to get a copy of your tax transcript is to order it online using the Get Transcript application on IRS.gov.

The IRS will be able to fill most requests and mail the copy of the transcript; you should receive it in about 10 days after making the online request.

- **NOTE:** *The “tax return transcript” is NOT an actual copy of the filed tax return as it does not come on Form 1040; it is a report reflecting different elements of the 1040*

When ordering your transcript, the IRS will mail the paper copy of the transcript to your address of record, which is the address you provided the IRS on your most recent tax return.

- **NOTE:** *If you want the transcript sent to you at a **different** address, you must first file IRS Form 8822 – Change of Address, **before** requesting your transcript*

For more information, read the IRS How Do I Get My Transcript? Fact Sheet
<https://www.irs.gov/uac/Newsroom/How-Do-I-Get-My-Tax-Transcript>