



Release of Taxpayer Information

The Tax Help program must confirm the identity of the taxpayer and spouse prior to releasing tax information in order to avoid the potential for identity theft or tax fraud. The taxpayer's identity is verified by visually comparing the taxpayer with their photo ID. If it is a joint tax return, Foundation Communities will release a copy of the tax return to one spouse after validating that person's identity.

If a taxpayer or spouse cannot substantiate their identity, or if a staff member or volunteer is uncomfortable accepting the items presented as proof of identity, the taxpayer and/or spouse should be advised to present an acceptable form of identification.

Requesting a copy of a tax return, Adjusted Gross Income (AGI), or other tax information

- **Verifying identity in person** – Foundation Communities tax staff will visually compare the taxpayer with their photo ID. Once their identity has been verified, staff will release a copy of the return or other tax return information as requested.
- **Verifying identity by encrypted email** – Foundation Communities tax staff will initiate an encrypted email by which the taxpayer will send a copy of their photo ID as well as a current selfie of themselves holding their photo ID. Upon validating the taxpayer's identity, the tax return copy or other tax return information will be sent via encrypted email to the taxpayer.
- **Releasing tax information by phone** – The only information Foundation Communities will release by phone (without having already verified the taxpayer's identity) is Adjusted Gross Income (AGI). The taxpayer must first verify their name, SSN/ITIN, and one or two other pieces of information from the return (as specified by Foundation Communities). If the taxpayer cannot correctly answer these questions or is requesting information other than AGI, the taxpayer will need to verify their identity using one of the above two options in order to receive the requested information.

Ordering an IRS Transcript

If the taxpayer is unsuccessful in validating their identity as outlined above, the taxpayer may alternatively request an IRS transcript in order to receive directly from the IRS the tax information they are seeking.

There are 3 easy ways to order your transcript:

- **ONLINE** - You can order your transcripts online by visiting www.irs.gov. Click the button "Get Your Tax Record" then select "Get Transcript Online" and follow instructions. To use this service, you will need: your SSN or ITIN, date of birth, filing status and mailing address from latest tax return.
- **OVER THE PHONE** – Order your transcript by calling 1-800-908-9946 and follow the voice prompts. You will need your Social Security or ITIN, date of birth, street address and Zip Code.
- **BY MAIL** – Print and fill out a Form 4506-T, then mail or fax it to the address listed on the form.

NOTE: If you order online or over the phone, the transcript will be mailed to the address on record with the IRS. If you would like to send it to a different address, you must order your transcript by mail (see option 3 above).