

# NORTH BENNET ST. SCHOOL

## OBTAIN A TAX RETURN TRANSCRIPT FROM THE INTERNAL REVENUE SERVICE (IRS) OR AUTHORIZE IRS DATA RETRIEVAL

Per U.S. Department of Education (DOE) regulation, copies of tax returns are not an acceptable form of income documentation. *Please do not submit copies of your 2017 federal tax returns unless specifically asked to do so.* Documentation of items found on a tax return will need to be completed either by using the 'Link to IRS' feature found on the Free Application for Federal Student Aid (FAFSA) website (preferred method – see "Correct your FAFSA" below) or by requesting a tax return transcript from the IRS. There are three ways to request a tax return transcript: online, by phone, or by mail/fax. If it is required, your financial aid award cannot be verified until the North Bennet Street School (NBSS) Financial Aid Office receives your tax return transcript. Do not request a Tax Account Transcript or Record of Account because they cannot be used for financial aid verification purposes. Please use the instructions provided below to request your tax transcript according to the method you prefer, or correct your FAFSA to authorize IRS data retrieval.

### **Online Request:**

- Go to [www.irs.gov](http://www.irs.gov)
- Click "Order a Return or Account Transcript" located under the Tools heading
- Click "Order a Transcript" under Step 3
- Enter your Social Security Number (SSN), Date of Birth, Street Address, and Zip Code (use the address currently on file with the IRS, or the address used on your 2017 tax return).
- Click "Continue"
- Select "Return Transcript"
- Enter "2017" for the 2019-2020 FAFSA.
- Click Continue

If successfully validated, you can expect to receive a paper IRS Tax Return Transcript at the address included in your online request, within 5 to 10 days from the time the on-line request was successfully transmitted to the IRS

### **Telephone Request:**

- Call the IRS Transcript Order Line at 1-800-908-9946
- Enter and verify your SSN and the numbers in your street address (use the address currently on file with the IRS, or the address used on your 2017 tax return).
- Select option "2" to request a Tax Return Transcript.

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- Enter “2017” for the 2019-2020 FAFSA.

If successfully validated, you can expect to receive a paper IRS Tax Return Transcript at the address used in your telephone request, within 5 to 10 days.

## **Mail/Fax Paper Request - IRS Form 4560T-EZ**

- Download the form at <http://www.irs.gov/pub/irs-pdf/f4506tez.pdf>.
- Complete lines 1 – 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address as filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. To have your transcript mailed directly to NBSS, use the following address: 150 North St., Boston, MA 02109.
- On line 6, enter “2017” for the 2019-2020 FAFSA.
- The tax filers (or spouse if requesting information from a joint tax return) must sign and date the form and enter their telephone number. Only one signature is required to request a transcript for a joint return.
- Mail or fax the completed IRS Form 4506T-EZ to the address (or FAX number) provided on page 2 of Form 4506T-EZ.

You can expect to receive your transcript within 5 to 10 days from the time the IRS receives and processes your signed request. Please note, in order to process your request, the IRS must be able to match the information on the 4506T-EZ with the information provided on your tax return. If these IRS records do not match, the IRS will notify you that it was unable to process your request for a tax transcript.

**CORRECT YOUR FAFSA (preferred method):** Rather than requesting an IRS tax transcript, you may verify your tax information by correcting your FAFSA to authorize IRS data retrieval if allowed by your filing method.\* To do this, please log-in to your FAFSA account at [wwwfafsa.gov](http://wwwfafsa.gov) and select make corrections to your FAFSA. You will find the ‘Link to IRS’ feature in the financial section of your FAFSA. **For assistance authorizing IRS data retrieval and for questions regarding your eligibility for this option, please call the Federal Student Aid Information Center help line at 800-433-3243.**

\*If your filing status makes you ineligible to use the FAFSA IRS data retrieval tool, and you have been selected for verification, you will be required to provide the NBSS Financial Aid Office with your tax transcript in order to receive financial aid.