

EARLE LAW OFFICES

A PROFESSIONAL CORPORATION
19925 STEVENS CREEK BOULEVARD
POST OFFICE BOX 1925
CUPERTINO, CALIFORNIA 95015

WWW.EARLELAW.COM

EARLELAW NEWSLETTER

408.786.1060

How to Obtain a Transcript of Your Past Tax Information

by Anthony F. Earle, Esquire*

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Taxpayers who need their past tax return information can obtain it from the IRS. Here are eight things to know if you need copies of your federal tax return information.

1. There are two easy and convenient options for obtaining free copies of your federal tax return information – tax return transcripts and tax account transcripts.

2. The IRS does not charge a fee for transcripts, which are available for the current year as well as the past three years.

3. A tax return transcript shows most line items from your tax return as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative or the IRS made after the return was filed. In many cases, a return transcript will meet the requirements of lending institutions, such as those offering mortgages and student loans.

4. A tax account transcript shows any later adjustments either you or the IRS made after the tax return was filed. This transcript shows basic data – including marital status, type of return filed, adjusted gross income and taxable income.

5. To request either transcript by phone, call 800-829-1040 and follow the prompts in the recorded message.

6. To request a tax return transcript through the mail, individual taxpayers should complete IRS Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript. Form 4506T-EZ is only for individuals who filed a Form 1040 series return.

Businesses, partnerships and individuals who need transcript information from other forms or need a tax account transcript must use the Form 4506T, Request for Transcript of Tax Return.

7. You should receive your tax return transcript within 10 working days from the time the IRS receives your request. Allow 30 calendar days for delivery of a tax account transcript.

8. If you still need an actual copy of a previously processed tax return, it will cost \$57 per tax year and take much longer. Complete Form 4506, Request for Copy of Tax Form, and mail it to the IRS address listed on the form for your area. Please allow 60 days for actual copies of your return. Copies are generally available for the current year as well as the past six years.

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Special Offer

Representation by an attorney is included in the fee for every federal and California state tax return prepared by EARLE LAW OFFICES.¹ Attorney representation of taxpayer clients includes representation at audit, administrative appeal, and in civil litigation.

Tax controversy services are also available in cases where the disputed return was prepared by the taxpayer or a third party.

¹ Subject to certain conditions, limitations, and restrictions.

Further information on tax preparation and tax controversy services offered by EARLE LAW OFFICES is available at: www.EarleLaw.com/tax.

Please call EARLE LAW OFFICES today to schedule an appointment to have your 2009 tax returns prepared.

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Earle Law Offices provides trial and appellate litigation, as well as non-litigation, legal services in the areas of business law, constitutional and civil rights law, family law, real estate law, tax law, and trusts and estates.

* Mr. Earle is licensed to practice law in all California state trial and appellate courts, the United States Supreme Court, the United States Court of Appeals for the Fourth and Ninth Circuits, federal trial courts in the Northern District of California, and the United States Tax Court. He has served as a Judge Pro Tempore for the Santa Clara Superior Court, and is also a licensed Real Estate Broker.

Mr. Earle received his law degree from the Santa Clara University School of Law, where he served as an Editor of the school's Law Review, and where he received awards for academic excellence. He received his undergraduate degree, with honors, in business administration from the University of La Verne.

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