

## Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2024 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2024, must provide:

- A signed statement listing the sources of any 2024 income and the amount of income from each source,
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2024,
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2024, and
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2024.

## Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return,
- A **2024 IRS Tax Return Transcript** (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all the income and tax information required to be verified, or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

A **2024 IRS Tax Return Transcript** may be obtained through:

Get Transcript Online – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript Online." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." To use the "Get Transcript Online" tool, the user must have (1) access to a valid email address, (2) a text-enabled mobile phone (pay-as-you-go plans cannot be used) in the user's name, and (3) specific financial account numbers (such as a credit card number or an account number for a home mortgage or auto loan). The transcript is displayed online upon successful completion of the IRS's two-step authentication.

Get Transcript by Mail – Go to [www.irs.gov](http://www.irs.gov), click "Get Your Tax Record." Click "Get Transcript by Mail." Make sure to request the "Return Transcript" and **NOT** the "Account Transcript." The transcript is generally received within 10 business days from the IRS's receipt of the online request.

Automated Telephone Request – 1-800-908-9946. Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.

Paper Request Form – IRS Form 4506T-EZ or IRS Form 4506-T. The transcript is generally received within 10 business days from the IRS's receipt of the paper request form.