



# IRS Tax Return Transcript Request Process H A M P S H I R E C O L L E G E

If the Hampshire College financial aid office is requesting a copy of your 2016 federal income tax return transcript, please follow the instructions below. Tax filers may request a transcript of their 2016 tax return from the IRS, free of charge, by phone, online, or by paper mail. Please DO NOT send a transcript to the financial aid office unless we have specifically requested it.

## **Telephone Request:** Call the IRS at 1-800-908-9946

- Follow prompts to enter tax filer's Social Security Number and the number in their street address.
- Select '**Option 2**' to request an IRS Tax Return Transcript and then enter '**2016**.'
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address used in their telephone request within 5 to 10 days from the time the IRS receives the request.
- Send a copy of the transcript to the financial aid office; see below for mailing instructions.

## **Online Request:** <https://www.irs.gov/individuals/get-transcript>

- At this site you may request a transcript online or by mail.
- With the online option you will be able to view, print, or download your transcript.
- Be sure to request the Tax RETURN Transcript, not the tax account transcript.
- If you want to request the transcript by mail, follow the instructions and the transcript will be sent within 10 days. Send a copy of the transcript to the financial aid office following the mailing instructions listed below.

## **Paper Request Form:** IRS Form 4506T-EZ

- Download the form at [www.irs.gov/pub/irs-pdf/f4506tez.pdf](http://www.irs.gov/pub/irs-pdf/f4506tez.pdf)
- Complete lines 1 through 4, following the instructions on page 2 of the form. Note that line 3 should be the most current address filed with the IRS. It is the address where the IRS Tax Return Transcript will be sent. If the address has recently changed, include the address listed on the latest tax return filed on line 4. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Line 5 provides tax filers with the option to have their IRS Tax Return Transcript mailed directly to a third party by the IRS. Please DO NOT request that the transcript be sent directly to Hampshire College as we may have difficulty matching a parent's incoming IRS Tax Return Transcript to the aid applicant, as the last names may be different.
- On line 6, enter '**2016**' to receive IRS tax information for the 2016 tax year.
- The tax filer (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 4506T-EZ to the appropriate address or fax number listed on page 2 of the form.
- Tax filers can expect to receive their transcript within 5 to 10 days from the time the IRS receives and processes their signed request. Note: Processing form 4506T-EZ means verifying and validating the information provided on the form. If any information does not match the IRS records, the IRS will notify the tax filer that it was not able to provide the transcript.
- Send a copy of the transcript to the financial aid office; see below for mailing instructions.

## **Send or fax tax transcripts to the Financial Aid Office:** Questions? Call us at 413.559.5484

- You may Fax your tax transcript to 413.559.5585;
- You may mail a copy to the Financial Aid Office, Hampshire College, 893 West Street, Amherst, MA 01002-3359
- Please be sure to write the name and/or the college ID number of the student on the tax transcript.
- NOTE: the transcript will have data printed on both sides of each page. If you are faxing or copying the transcript, be sure to include both sides of each page.
- Please DO NOT EMAIL the transcript to the financial aid office.