## How to Set Up an Account with the IRS: (budget 5-10 minutes)

## WHY?

Without an IRS Tax Account, you cannot easily gain access to the following tax information associated with your SSN:

- IRS tax return transcript (Ex: Form 1040)
- IRS Tax Forms (Ex: W2s and 1099s)
- IRS Tax Notices Ex: <u>IRS Notice 1444-C</u> for stimulus payment, and <u>IRS Letter 6419</u> on Advanced Child Tax Credit payments)
- Estimated Tax payment history and links to pay estimated tax online.

**QUESTION:** Should my spouse set up his or her own account with the IRS?

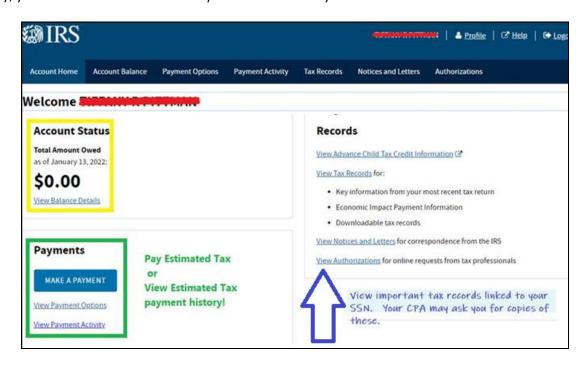
**ANSWER:** Yes. Because your spouse's account may have information linked to only his or her SSN yet contain necessary information for your JOINT tax return.



## **HOW TO:**

(TIP: Believe it or not, these steps are MUCH easier to accomplish from your smart phone rather than desktop.)

- 1. Create an Account with the IRS: Start by Clicking HERE
- 2. Select: *Create a new account* via *ID.me*. Your smart phone makes identity verification process fairly quick and easy about 5 minutes. The IRS has partnered with *ID.me* to verify your identity through a series of steps.
  - Upload pictures of the front and back of your driver's license or Passport
  - Video scan of your face
  - Email and text verification
  - SSN verification
  - Mailing address verification
  - Finally, you will "Allow" ID.me to share your verified identity with the IRS.



3. Lastly, <u>Bookmark the IRS Account Login</u> for future ease of access. Before you log out, go snoop around. Your IRS account has loads of helpful information (see screen shots below) <sup>☺</sup>

