



IRS Tax Return Transcript Request Process HAMPSHIRE COLLEGE

If the Hampshire College financial aid office is requesting a copy of your 2011 federal income tax return, please follow the instructions below. Tax filers may request a transcript of their 2011 tax return from the IRS, free of charge, online, by phone, or by paper. Please DO NOT send a transcript to the financial aid office unless we have specifically requested it.

Online Request: Visit the IRS website at www.irs.gov

- In the **Online Tools** section, click '**Order a Tax Return or Account Transcript**'
- Click '**Order a Transcript**'
- Enter the tax filer's Social Security Number, date of birth, street address, and Zip Code. Use the address listed on the latest tax return filed. However, if an address change has been completed through the U.S. Postal Service, the IRS may have the updated address on file.
- Click '**Continue**'
- In the **Type of Transcript** field, select '**Return Transcript**' and in the **Tax Year** field, select '**2011**'
- If successfully validated, tax filers can expect to receive a paper IRS Tax Return Transcript at the address included in their online request, within 5 to 10 days from the time the request was successfully transmitted to the IRS.
- Send a copy of the Transcript to the financial aid office. Write the name of the student on the form.

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 '**2011**'
- 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. Write the name of the student on the form.

Paper Request Form: IRS Form 4506T-EZ

- Download the form at 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 two names may be different.
- On line 6, enter '**2011**' to receive IRS tax information for the 2011 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. Write the name of the student on the form.

Send or fax tax transcripts to the Financial Aid Office:

- You may Fax your tax transcript to 413.559.5585; or
- Mail it 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.
- If you have any questions about the Tax Return Transcript request process or why it is required by the financial aid office please call us as 413.559.5484.