

# Be Prepared to Validate Identity if Calling the IRS

The Internal Revenue Service (IRS) has issued some tips regarding taxpayer phone calls to them, including what information callers need to be able to provide to the IRS call center assistants to validate their identity.

Callers should have the following data ready when they call the IRS, to verify their identity:

## **If calling about a personal tax account, have the following information ready:**

- Social Security numbers and birth dates for those listed on the tax return
- An Individual Taxpayer Identification Number (ITIN) for those without a Social Security number (SSN)
- Filing status – Single, Head of Household, Married Filing Joint or Married Filing Separate
- Prior-year tax return. The IRS may need to verify identity before answering certain questions
- A copy of the tax return in question

## **If calling about someone else's account:**

The IRS call center assistants will only speak with the taxpayer or his legally designated representative. Before calling, have the following information ready:

- Verbal or written authorization to discuss the account
- The ability to verify the taxpayer's name, SSN/ITIN, tax period, form(s)
- If the caller is a third-party designee, a PTIN or PIN
- A current, completed, and signed Form 8821, Tax Information Authorization or
- A completed and signed Form 2848, Power of Attorney and Declaration of Representative

## **If calling about a deceased taxpayer, be prepared to fax:**

- The deceased taxpayer's death certificate, and
- Either copies of the Letter of Testamentary approved by the court or IRS Form 56, Notice Concerning Fiduciary Relationship (for estate executors)

## **If calling about a Letter 4883C:**

The IRS sends letters to taxpayers inquiring about suspicious tax returns it has identified. It's important for the IRS and the taxpayer to confirm whether or not the taxpayer actually filed the return in question. Taxpayers have 30 days to call. To expedite the process when calling, taxpayers *must* have:

- The IRS letter
- Copy of prior year tax return (if filed)
- Current year tax return (if filed)
- Any supporting documents for each year's return (such as W-2s, 1099s, Schedule C, Schedule F, etc.)