



Research and Planning Consultants, LP

**SOURCES OF DATA ON EARNINGS
AND WORK HISTORY**

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Introduction

1. Lost earnings and lost earning capacity are often elements of economic damages in personal injury, wrongful death, and employment litigation. To calculate these damages accurately, a vocational or economic expert must develop a history of the plaintiff's employment and earnings that is as complete as possible. This paper discusses the source materials an expert should request to construct the plaintiff's earnings and employment history. This paper focuses on plaintiffs who are employed or are independent contractors. It is not intended to identify the data needed for a complete analysis of lost earnings for a corporation.

2. To conduct a loss of earning capacity analysis, the expert needs a thorough understanding of the plaintiff's pre-injury and post-injury work and earnings to make reasonable projections on future earnings with and without the injury. Several types of documents may provide this information, and more than one type is often needed.

3. For example, if an expert has access to a plaintiff's pay statements or tax returns, it is usually possible to estimate average wages. But that analysis would be incomplete, because an expert should not focus only on the plaintiff's wages. Information on employment patterns and the reasons behind periods with unusually high or low earnings is also necessary.

4. The expert should obtain information from documents and should not rely only on information from deposition testimony or interviews with the plaintiff. Unintentionally or intentionally, plaintiffs may provide inaccurate or incomplete information, even on their most recent jobs. Some plaintiffs know the amount of their take-home pay but not their gross pay. Their recollection of how many overtime hours they work in an average year is often unreliable. Plaintiffs may not know how employers calculate bonuses or commissions. They may know the categories of fringe benefits received but not the cost to the employer or the replacement value. Plaintiffs often cannot remember the dates of employment and earnings for earlier jobs. Verbal information from plaintiffs is most useful as a guide to further questions and to what documents to request and from whom.

5. To develop a complete picture of the plaintiff's employment and earnings history, the expert needs to know what jobs a plaintiff held since completing their formal education. For each job, the expert should know the employer, dates of employment, job description, pay rates, fringe benefits, promotions, and reason for separation. This information should be more detailed for jobs closer in time to the injury, with full details for jobs held in the five years before the injury.

6. The expert should request a Social Security earnings statement, and beginning with the five years before the injury, complete tax returns, W-2 records, pay statements, and employment records. We discuss below what information each type of document provides.

7. The documents we discuss below include:

- Social Security Earnings Statements
- Federal income tax returns
- W-2 records
- Self-employment records
- Employment records and pay statements

Social Security Earnings Statement

8. The Social Security Earnings Statement (SSES) is the best single document showing a plaintiff's annual earnings history. The SSES can show years for which further information is needed to explain gaps in employment or years with unusually high or low earnings. The SSES can be used to calculate future Social Security retirement benefits and any loss of those retirement benefits.

9. There are two types of SSES documents, a summary SSES and an itemized Statement of Earnings. Attachment 1 has a sample of each type. The summary SSES shows two amounts for each year the plaintiff worked, Social Security taxable earnings and Medicare taxable

earnings (including self-employment earnings reported on income tax returns).¹ The itemized Statement of Earnings shows Social Security taxable earnings for each of the years requested by the employer.

10. The SSES does not provide the expert with all the information on a plaintiff's earnings. Amounts reported on each type of SSES may not represent gross earnings. Annual totals do not identify dates of employment or pay rates, or differentiate between base salary and other types of pay. The latest year on the SSES may not be complete. Any unreported earnings or earnings from an employer not covered by the Social Security program, such as a government entity or an employer in another country, will not appear on an SSES.

11. Plaintiffs with a Social Security number can quickly obtain their personal summary SSES by creating an account on the Social Security website.² They can obtain a summary SSES at any time and at no cost.

12. Plaintiff's counsel may assist the plaintiff in obtaining a summary SSES online or through the mail. Defense counsel may make a document production request for the plaintiff's SSES and a motion to compel production, if necessary, as obtaining a summary SSES imposes no cost or unreasonable burden.

Obtaining a Summary SSES Online

13. Below are the steps for plaintiffs to quickly obtain a summary SSES online at no cost. The entire procedure with screenshots is available in Attachment 1.

14. First, plaintiffs must navigate to <https://www.ssa.gov/myaccount/statement.html>. If they have an existing account with the Social Security Administration (SSA), they may use the "Sign In" button on that page to go to the login screen. The login screen gives three options to sign in:

¹ Social Security earnings are subject to an annual taxable maximum. Medicare earnings are not.

² "Create Your Personal My Social Security Account Today," Social Security Administration, <https://www.ssa.gov/myaccount>.

- For accounts created before September 18, 2021, users may sign in with a traditional username and password.
- For accounts created on or after September 18, 2021, there are two different services the federal government now uses for sign-ins to all its websites: **Login.gov** and **ID.me**. Users with existing accounts for either of these services may log in using the appropriate credentials.
- Plaintiffs who lack an existing account must create one with either Login.gov or ID.me. Of the two, it is easier and faster to obtain a Login.gov account. Plaintiffs must go to <https://secure.login.gov/> to begin the process. Once on that site, they should click “Create Account,” and will then be asked to enter their email address. A confirmation email will be sent to the email address provided. Plaintiffs must click “Confirm Email Address,” which will direct them to a screen to create a password.

15. Plaintiffs will then have to provide another form of verification (such as a phone number) to allow for multi-factor authentication. Once they have provided verification through a phone number, they will need to have this information available to verify and finish setting up the account:

- Valid email address
- Valid Social Security number
- US mailing address
- Date of birth (must be at least 18 years old)
- Phone number

16. Plaintiffs are then sent through a series of prompts to enter this information and to receive an activation code for the account. If they already have an active online account but did not know it before creating the account, the Login.gov username will simply be linked to the existing Social Security account. If plaintiffs with existing accounts try to log in with incorrect credentials, they will be directed to a screen with information on contacting SSA customer service.

17. Once all information is entered and the plaintiff logs in to the account, the Social Security statement can be accessed from the home page by clicking on “Your Social Security Statement.” Full earnings records can be accessed by clicking “Review Your Full Earnings Record Now.”

Obtaining an SSES by Mail

18. Each type of SSES may be obtained by filing a written request to the SSA. Attachment 1 includes form SSA-7004 for requesting a summary SSES and form SSA-7050-F4 for requesting an itemized Statement of Earnings. A summary SSES written request by the plaintiff will be fulfilled within four to six weeks at no cost. An itemized statement, only available through written request by a plaintiff or related party, will be fulfilled within 120 days at a cost of \$100.

Federal Income Tax Returns

19. An expert should request complete tax returns for at least the five years before the injury, the year of the injury, and all later years. The request should include the tax return, all supporting schedules, and W-2 records.

Information Available from Tax Returns

20. A plaintiff’s Form 1040 Individual Income Tax Return³ with all supporting schedules and W-2 records provides information on annual wages and other income. If the filing status is not Married Filing Jointly, the information in Box 1 reports annual taxable wages for the plaintiff. If the filing status is Married Filing Jointly, the information in Box 1 is for both the plaintiff and the spouse. W-2 records are necessary to determine earnings by employer and to separate household income between the plaintiff and the spouse. Any self-employment earnings reported on Form 1040 are summarized on Schedule 1, with details on Schedule C.

³ Or other variations, such as 1040-EZ, 1040-A, etc.

21. A plaintiff's Form 1040 without supporting schedules and W-2 records does not provide enough information to reliably interpret the amounts on the form. For example:

- The line on the tax return for wages does not show to or by whom wages were paid. If the plaintiff filed as Married Filing Jointly, there is no way to separate earnings between the plaintiff and spouse. Tax returns do not show during what part of the year wages were earned.
- Wages on the 1040 are only the wages subject to tax. Many employees have insurance, 401(K) deductions, or other pre-tax deductions that reduce gross pay to the wage amounts on the tax return.
- If the plaintiff has non-wage income or any adjustments to income, supporting schedules are necessary to understand these amounts. The supporting schedules may reveal other work or information that should be analyzed to determine future earning capacity.
- If the plaintiff itemized deductions instead of using the standard deduction, the supporting Schedule A must be analyzed to determine whether the deductions are likely to recur in the future.
- The age of children or other dependents affects the number of exemptions and potential entitlements to child tax credits or earned income tax credits. Dependents' ages are not shown on tax returns and must be obtained from other sources.

22. The Internal Revenue Service (IRS) can provide copies of tax returns and a variety of information from tax returns if the plaintiff does not have copies. There are several ways to get tax return and W-2 information from the IRS. Attachment 2 has examples of Form 4506 Request Copy of Tax Return and Form 4506-T Request Copy of Tax Return Transcript, along with sample copies of an individual tax return, a tax return transcript, and a wage and income transcript.

Requesting Tax Return and W-2 Information

Access and Download Records Through an Online Account

23. Plaintiffs can access their tax records, including a transcript, using an online account, accessible at <https://www.irs.gov/payments/your-online-account>. The online account

allows users to view, print, or download all tax return transcripts, tax account transcripts, and wage and income transcripts, and to download a verification of non-filing letter. Tax return and tax account transcripts are limited to the current and prior three tax years. Accessing these materials online is the fastest and least expensive way to retrieve transcripts. The link for accessing transcripts online is available at <https://www.irs.gov/individuals/get-transcript>.

Order Transcripts Online

24. Plaintiffs can also order online a transcript to be mailed by accessing <https://sa.www4.irs.gov/irfof-tra/login>. This site requires entering some summary personal information to initiate the request. After entering in the information, plaintiffs may request a tax return transcript or a tax account transcript, with the option to choose one of several years for the transcript. The IRS states it generally takes between five and ten business days to receive the transcript.

Order Tax Return Transcripts or Copies by Mail

25. Plaintiffs can also order tax return transcripts using Form 4506-T. Transcripts are generally available for the current year plus three prior years, and most requests are processed within ten business days. The taxpayer must sign the form. A copy of Form 4506-T is available at <https://www.irs.gov/pub/irs-pdf/f4506t.pdf> and is included in Attachment 2.

26. Plaintiffs can order copies of their original tax returns using Form 4506 for the most recent year and up to seven prior years. That form lets the taxpayer identify a third party (such as legal counsel) to whom the transcript can be sent. There is a \$30 fee for each return requested, and it may take up to 75 calendar days to process the request. A copy of Form 4506 is available at <https://www.irs.gov/pub/irs-pdf/f4506.pdf>.

Call To Request a Transcript

27. Plaintiffs can call 800-908-9946, the IRS transcript order phone line, for a series of prompts in both English and Spanish. They will be prompted to enter their Social Security

number. The number of the plaintiff's street address will also be requested. Up to ten transcripts can be requested during the call.

28. For more information on transcript types, visit <https://www.irs.gov/individuals/transcript-types-and-ways-to-order-them>. This site provides information and links that allow users to readily access forms and online sign-ins.

W-2 Records

29. Every year the IRS requires employers to give each employee a Form W-2. A W-2 shows taxable earnings and earnings subject to Medicare and Social Security payroll taxes:

- Taxable Earnings (Box 1) represent Medicare Earnings less 401(k) contributions.
- Social Security Earnings (Box 3) represent the same as Medicare Earnings (Box 5), subject to the Social Security earnings cap. For plaintiffs earning above the cap, Social Security Earnings will be less than Medicare earnings.
- Medicare Earnings (Box 5) represent Gross Earnings less pre-tax insurance payments, flexible spending account (FSA), health savings account (HSA), etc.

30. A W-2 may show 401(K) contributions in Box 12, code D. Additional amounts in Box 12 may show other pre-tax contributions, but may not be separately identified as paid by the employer.

31. A W-2 alone does not provide enough information to determine a plaintiff's earning capacity.⁴ It does not show the plaintiff's pay rate, dates employed, hours worked, or types of pay (base pay, overtime, commissions, bonuses, etc.). An employee's gross salary amount may not appear on the W-2.

32. Attachment 3 shows two sample W-2s. The first sample W-2 is for a high-wage plaintiff with several pre-tax deductions and retirement contributions. The second sample W-2 is

⁴ This discussion is a simplified example. For a more detailed discussion, refer to the article by Jennifer L. Polhemus, "Some Perils of Relying Solely on W-2 Forms for Earnings History," *The Forecast* 30, no. 1 (Feb. 2016): 9-11.

a common situation showing a simple scenario in which a W-2 may not provide all the information needed for an earnings analysis.

Self-Employment Records

33. Self-employed workers will not receive Form W-2 from an employer. The expert must rely on 1099 forms and supporting schedules for tax returns in order to analyze earnings for self-employed plaintiffs.

1099 Records

34. Any compensation over \$600 per year to someone other than an employee from an individual or company is reported on a 1099 form. There are many types of 1099 forms, ranging from dividend income to asset sale proceeds. The 1099 form most relevant to a plaintiff's earnings history is for non-employee compensation, on form 1099-NEC. Non-employee compensation is sometimes also reported on a form 1099-MISC for miscellaneous income. Non-employee compensation is typical for self-employed or contract workers. If plaintiffs have compensation reported on a 1099 form, information on expenses associated with this revenue is necessary to understand their net income.

Schedule C

35. Schedule C (Form 1040) is used to report income or loss from a business a plaintiff operated as a sole proprietor. Schedule C is required if a plaintiff engages in an activity with a primary purpose of income or profit generation, and that activity is done with continuity and regularity.⁵ Schedule C has information on both income and expenses for a business. A sample Schedule C is in Attachment 4. If a plaintiff is self-employed, Schedule C can provide useful information on their income (or loss) from that business. Because Schedule C calculates net profit (or loss), it provides a more complete overview of a plaintiff's net earnings from a business than may be available through an interview or other documents. Additionally, some

⁵ IRS 2023 Instructions for Schedule C, available at <https://www.irs.gov/instructions/i1040sc>.

expenses deducted from business profit are dual-use items that may be considered earnings. Details on these itemized business expenses can be analyzed only with a Schedule C.

36. If a plaintiff owns a corporation or partnership, more detailed information may be needed. These cases may require analysis of the company's profit and loss statements along with any information about the plaintiff's role with the company and how the person received compensation. This situation is beyond the scope of this paper.

Employment Records

37. For an expert retained by plaintiff's counsel, the expert should request information about the injured party's employment, including employer name, title, and dates of employment for jobs at least five years before the injury, the year of injury, and all years since the injury. For an expert retained by defense counsel, the plaintiff's deposition or the plaintiff's expert report may provide information on previous employers and dates of employment. Experts should request three types of records from current and past employers: personnel records, payroll records, and related company records.

Personnel Records

38. Personnel records include information such as:
- Job title
 - Job descriptions for positions held with each employer
 - Dates and details for wage increases and position changes
 - Workers' compensation claims
 - Dates of employment and reason for leaving
 - Calculations for other types of pay such as bonuses and commissions
 - Performance evaluations
 - Disciplinary actions
 - Benefits enrollment
 - Training and certifications

- Planned raises or promotions
- Patterns of serious disciplinary or health problems

Payroll Records

39. Payroll records may show hours paid, overtime hours, leave and holiday time, payments outside normal base pay, and deductions for employee-paid insurance or contributions to 401(K) or other retirement plans. Payroll records may also show the employer costs or contributions toward payroll taxes and benefits. Any gaps in employment (e.g., unpaid periods for a seasonal job or lack of work) will be clear from gaps in pay dates.

40. When company payroll and personnel records are unavailable, a pay statement may give information that helps frame questions to get a better understanding of earnings and benefits. A pay statement provides valuable information, even if the plaintiff has only one or a few. Not all pay statements provide the same information. Year-end pay statements are most helpful as they provide annual estimates of earnings and benefits.

41. These facts may be available from a pay statement:

- Hourly or per-pay-period rate of pay
- Hours worked
- Employee and/or employer paid amounts for several types of insurance
- Employee and/or employer paid amounts for 401(K), FSA, HSA
- Bonuses, commissions, or other special pay
- Year-to-date amounts for the above

Related Company Records

42. Related company records include documents such as employee handbooks, company policies, retirement plans, bonus or commission plans, and benefits plans including a breakdown of employee and company cost sharing, etc.

43. While employer records provide a level of detail unavailable anywhere else, work for one employer may not be representative of the injured person's past employment and

earnings or their future capabilities with or without the injury. Experts should request records from earlier employers. Information from earlier employers may be different and affect projections of future earning capacity. If employers do not voluntarily respond to a request for records, counsel can issue a subpoena for the relevant records.

If Earnings Records Are Not Available

44. In the event the earnings records discussed above are not produced for review, the next best alternative is to use published statistics to estimate a plaintiff's past or future earnings.. The first step in obtaining the statistics on wages for a specific job is to use the Dictionary of Occupational Titles (DOT) to determine the proper Standard Occupational Classification (SOC) code. This is done by accessing the DOT at <https://occupationalinfo.org/> and performing a search for the job of interest. Attachment 5 describes this process with screenshots.

45. For example, to analyzing the earnings of a welder-fitter, type “welder-fitter” into the search bar and select the proper job from the search results.

46. Next, click on “Welder-Fitters” to obtain the representative SOC code and job title needed to determine the wage statistics from the US Department of Labor’s Bureau of Labor Statistics (BLS). The proper SOC code and job title can be found at the bottom of the page.

47. In this instance, search the BLS website for SOC code 51-4121 and the job title “welders, cutters, solderers, and brazers.”

48. The BLS earnings statistics for specific jobs can be accessed at <https://www.bls.gov/bls/blswage.htm>. From this web page search for the statistical wages for a welder-fitter based on location. If the welder-fitter worked construction jobs throughout the country, the expert will typically select “National Wage Data.” For a welder-fitter who traveled throughout their respective state to work, the expert will select “Wage Data by State.”

49. For this example, the welder-fitter primarily worked in the area of Dallas, Texas, so the next step is to select “Wage Data by Metropolitan Area.” From there, select the proper Metropolitan Statistical Area (MSA), which in this case is “Dallas–Fort Worth–Arlington, TX.”

50. Specific jobs are grouped into Major Occupational Groups, which are represented by the first two digits of the SOC code. First select the Major Occupational Group associated with 51-0000, which is listed as “Production Occupations.” Next, locate the proper job based on the full SOC code 51-4121 and the job title “welders, cutters, solderers, and brazers.”

51. Once the proper SOC code and job title are located, find the median wages for a welder-fitter in the Dallas, Texas, metropolitan area. If more detailed wage information is wanted, select the specific job to access it.

52. Typically, vocational experts use the median wages for a job if the plaintiff has experience in that job. The median wages are used, as opposed to the mean, or average, wages, since the median wage is the midpoint of the dataset and is not influenced by extreme outliers. If a plaintiff was in an entry-level position or had minimal experience, the 25th percentile may be representative of their wages, as opposed to the median wages. If a plaintiff had multiple years of experience, with reported increases in wages and responsibilities over the same period, a vocational expert may report the 90th percentile wages for informational purposes but still use the median wages as the most reasonable. Which wage percentile to use is a depends heavily on the details of each individual plaintiff.

53. Sometimes, workers may have no work or earnings history to rely on, such as a young worker newly entering the workforce. In these cases, an expert may rely on median earnings by age and educational attainment. For cases involving young children, characteristics of the parents may inform the projected educational attainment and future earning capacity of the plaintiff.

Conclusion

54. The documents described above, along with interviews or deposition testimony of the plaintiff, help form a complete picture of a plaintiff's work and earnings history, and provide a basis for experts to opine on economic damages. No single type of document gives all the information on the plaintiff's employment and earnings history. The expert should request a Social Security earnings statement, complete tax returns, W-2 records, pay statements, and employment records from the employer at the time of the injury and other recent employers.

At Research and Planning Consultants, LP (RPC), we provide expert reports and expert testimony on economic damages for plaintiff and defense counsel. Our consultants have been accepted as experts in their fields in state and federal courts. Our team can simplify your search for experts and reduce litigation expenses and time spent coordinating experts.

RPC has many experienced expert witnesses, including certified vocational consultants, physicians, and economists. To learn more about RPC's loss of earning services, you can visit our website at www.rpcconsulting.com. If you have questions about this whitepaper, please contact Angela VanDerwerken, PhD, at 512.617.8053, avanderwerken@rpcconsulting.com or Michael Scullin, MHS, CRC, LRC, CVE, CLCP, at 512.790.0315, mscullin@rpcconsulting.com.

Attachment 1



Your Social Security Statement

WANDA WORKER

February 2, 2023

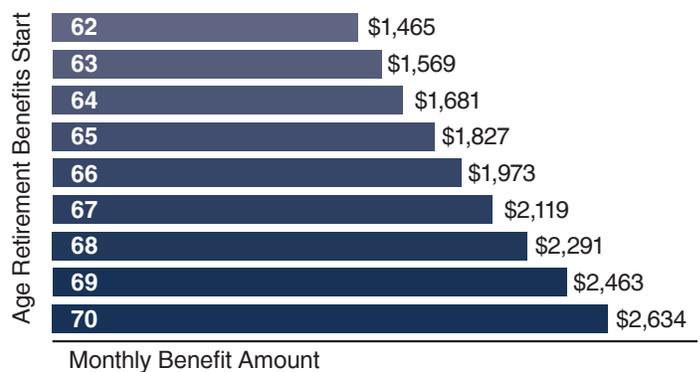
Retirement Benefits

You have earned enough credits to qualify for retirement benefits. To qualify for benefits, you earn “credits” through your work — up to four each year.

Your full retirement age is **67**, based on your date of birth: April 5, 1962. As shown in the chart, you can start your benefits at any time between ages **62** and **70**. **For each month you wait to start your benefits, your monthly benefit will be higher—for the rest of your life.**

These personalized estimates are based on your earnings to date and assume you continue to earn \$54,489 per year until you start your benefits. Learn more at ssa.gov/benefits/retirement/learn.html.

Personalized Monthly Retirement Benefit Estimates (Depending on the Age You Start)



Disability Benefits

You have earned enough credits to qualify for disability benefits. If you became disabled right now and you have enough recent work, your monthly payment would be about **\$2,083**. Learn more at ssa.gov/disability.

Survivors Benefits

You have earned enough credits for your eligible family members to receive survivors benefits. If you die this year, members of your family who may qualify for monthly benefits include:

Minor child:	\$1,562
Spouse, if caring for a disabled child or child younger than age 16:	\$1,562
Spouse, if benefits start at full retirement age:	\$2,083
Total family benefits cannot be more than:	\$3,802

Your spouse or minor child may be eligible for an additional one-time death benefit of **\$255**. Learn more at ssa.gov/survivors.

Medicare

You have enough credits to qualify for Medicare at age 65. Medicare is the federal health insurance program for people:

- age 65 and older,
- under 65 with certain disabilities, and
- of any age with End-Stage Renal Disease (ESRD) (permanent kidney failure requiring dialysis or a kidney transplant).

Even if you do not retire at age 65, you may need to sign up for Medicare within 3 months of your 65th birthday to **avoid a lifetime late enrollment penalty**. Special rules may apply if you are covered by certain group health plans through work.

For more information about Medicare, visit medicare.gov or ssa.gov/medicare or call **1-800-MEDICARE (1-800-633-4227)** (TTY 1-877-486-2048).

We base benefit estimates on current law, which Congress has revised before and may revise again to address needed changes. Learn more about Social Security’s future at ssa.gov/ThereForMe.

Earnings Record

Review your earnings history below to ensure it is accurate because we base your future benefits on our record of your earnings. There's a limit to the amount of earnings you pay Social Security taxes on each year. Earnings above the limit do not appear on your earnings record. We have combined your earlier years of earnings below, but you can view your complete earnings record online with [my Social Security](#). **If you find an error**, view your full earnings record online and call **1-800-772-1213**.

Work Year	Earnings Taxed for Social Security	Earnings Taxed for Medicare (began 1966)
1971-1980	\$ 2,142	\$ 2,142
1981-1990	87,102	87,102
1991-2000	246,069	246,069
2001	34,147	34,147
2002	34,846	34,846
2003	36,021	36,021
2004	38,032	38,032
2005	39,711	39,711
2006	41,829	41,829
2007	43,971	43,971
2008	45,170	45,170
2009	44,603	44,603
2010	45,666	45,847
2011	47,093	47,093
2012	48,560	48,560
2013	49,095	49,095
2014	50,605	50,605
2015	51,996	51,996
2016	52,108	52,108
2017	53,251	53,251
2018	53,966	53,966
2019	54,559	54,559
2020	54,489	54,489
2021	Not yet recorded	

Taxes Paid

Total estimated Social Security and Medicare taxes paid over your working career based on your Earnings Record:

Social Security taxes

You paid: \$75,568
Employer(s): \$77,498

Medicare taxes

You paid: \$18,158
Employer(s): \$18,158

Earnings Not Covered by Social Security

You may also have earnings from work not covered by Social Security, where you did not pay Social Security taxes. This work may have been for federal, state, or local government or in a foreign country. If you participate in a retirement plan or receive a pension based on work for which you did not pay Social Security tax, it could lower your benefits. Learn more at ssa.gov/gpo-wep.

Important Things to Know about Your Social Security Benefits

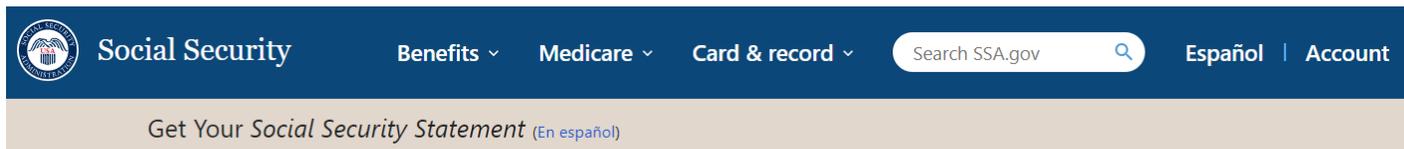
- Social Security benefits are not intended to be your only source of retirement income. You may need other savings, investments, pensions, or retirement accounts to make sure you have enough money when you retire.
- You need at least 10 years of work (40 credits) to qualify for retirement benefits. Your benefit amount is based on your highest 35 years of earnings. If you have fewer than 35 years of earnings, years without work count as 0 and may reduce your benefit amount.
- To keep up with inflation, benefits are adjusted through "cost of living adjustments."
- If you get retirement or disability benefits, your spouse and children may qualify for benefits.
- When you apply for either retirement or spousal benefits, you may be required to apply for both benefits at the same time.
- If you and your spouse both work, use the [my Social Security Retirement Calculator](#) to estimate spousal benefits.
- The age you claim benefits will affect the benefit amount for your surviving spouse. For example, claiming benefits after your full retirement age may increase the *Spouse, if benefits start at full retirement age* amount on page 1; claiming early may reduce it.
- If you are divorced and were married for 10 years, you may be able to claim benefits on your ex-spouse's record. If your ex-spouse receives benefits on your record, that does not affect your or your current spouse's benefit amounts.
- Learn more about benefits for you and your family at ssa.gov/benefits/retirement/planner/applying7.html.
- When you are ready to apply, visit ssa.gov/benefits/retirement/apply.html.
- The *Statement* is updated annually. It is available online, or by mail upon request.

[SSA.gov](https://ssa.gov) | Follow us on social media ssa.gov/socialmedia

Requesting a Social Security Earnings Statement

Users will see these screens when requesting a Social Security Earnings Statement. We have outlined **in red** the options an individual should click.

Begin by navigating to <https://www.ssa.gov/myaccount/statement.html>. The user will see a screen that looks like the picture below. If the user has an existing account, he or she should click the “Sign in” button. If a user needs to create an account, he or she should click the “Create your account” button.



Social Security Statement

Your *Social Security Statement (Statement)* is available to view online by opening a *my Social Security* account. It is useful for people of all ages who want to learn about their future Social Security benefits and current earnings history.

For workers age 60 and older who do not have a *my Social Security* account, we currently mail *Social Security Statements* three months prior to your birthday.



Sign in

Create your account

Sample Statement

We redesigned the *Statement* to make it easier for you to read and find the information you need!

The redesigned *Statement* now includes a bar graph displaying your personalized retirement benefit estimates at nine different ages, depending on when you want benefits to start. It also includes your earnings history, and information on how to report an error if you find one.

We encourage you to review your *Statement* annually. Below, you can view a sample *Statement* and the valuable information it provides. Your personal *Statement* may include different language, depending on your situation.

- *Social Security Statement* Samples
 - [Online Statement](#) 
 - [Statement for People with Noncovered Earnings](#) 
 - [Mailed Statement](#) 

Fact Sheets Added to *Statement*

The following page shows the next screen the user will see if he or she has an account and click “Sign in.” We’ve include guidelines on what to choose depending on what kind of account the user has.



Create an Account or Sign In

[Create an account with Login.gov](#)

Sign in with LOGIN.GOV

Sign in with ID.me

[Learn more](#)

Sign in with Social Security Username

For accounts created *before* September 18, 2021

[? Don't know which option to sign in with?](#)

Are you now, or have you ever been a victim of domestic violence? Identity theft? Do you have other concerns?

You can [contact us](#) to block electronic access to your information at any time, for any reason.

Choose if the user does not have a login and needs to create an account

Choose if an attempt to use LOGIN.GOV was unsuccessful or the user has a known account with ID.me

Choose if an online account was created with Social Security on or after 9/18/2021

Choose if an online account was created with Social Security before 9/18/2021

Creating an Account with Login.gov

A person can create a new account to access Social Security information at <https://secure.login.gov/>. Once on that site, the user should click “Create Account” as shown on the screen to the right.

The user will then be asked to enter an email address. A confirmation email will be sent to the email address provided. The user must click “Confirm Email Address,” which will direct him or her to a prompt to create a password.

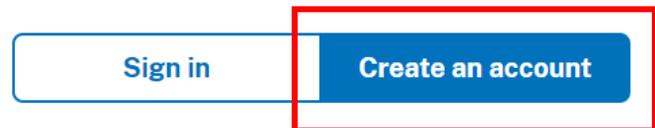
The user will then have to provide another form of verification (such as a phone number) to allow for multi-factor authentication. Once the user has provided verification through a phone number, he or she will need to have the following information available to verify and finish setting up the account:

- Valid Email Address
- Valid Social Security Number
- US Mailing Address
- Date of Birth (Must be at least 18 years of age)
- Phone Number

The user will then be sent through a series of prompts to enter this information and to receive an activation code for his or her account. If the user already has an active online account but did not know before creating the account, the login.gov username will simply be linked to the existing Social Security account.



SSA is using Login.gov to allow you to sign in to your account safely and securely.



Create an account for new users

Enter your email address

Select your email language preference

Login.gov allows you to receive your email communication in English, Spanish or French.

English (default)

Español

Français

I read and accept the Login.gov [Rules of Use](#)

Submit

Obtaining the Social Security Statement

Once all information is entered and the person logs in to their account, he or she can access the Social Security Statement from the home page, by clicking on “Your Social Security Statement” or access their full earnings records by clicking “Review Your Full Earnings Record Now” as shown on the screen below.

The screenshot shows the user interface of the my Social Security website. At the top left is the my Social Security logo. To the right of the logo is a black redaction box and a "Sign Out" link. Below the logo are navigation links for Home, Messages, and My Profile. A welcome message reads "Welcome, [redacted]". A notification box states "You last signed in on February 9, 2024 at 3:31 PM ET." The main content area features three cards: "Your Social Security Statement" (highlighted with a red box), "Replace your Social Security Card", and "Your Benefit Verification Letter". Below these is a section titled "Eligibility and Earnings" which includes a progress bar showing 40 work credits (highlighted with a red box) and a question about 2023 earnings (with a red box around the "Review your full earnings record now" link). A "Learn more about eligibility and work credits" link is at the bottom.

 **my Social Security** [redacted] [Sign Out](#)

[Home](#) [Messages](#) [My Profile](#)

Welcome, [redacted]

You last signed in on **February 9, 2024 at 3:31 PM ET.**

-  [Your Social Security Statement](#)
You can download your statement as a PDF or XML file.
-  [Replace your Social Security Card](#)
-  [Your Benefit Verification Letter](#)
Your letter proving you receive or do not receive Social Security Benefits.

Eligibility and Earnings

You have the 40 work credits you need to receive benefits!



This includes credits not yet reported on your earnings record from last year and this year if you continued to work.

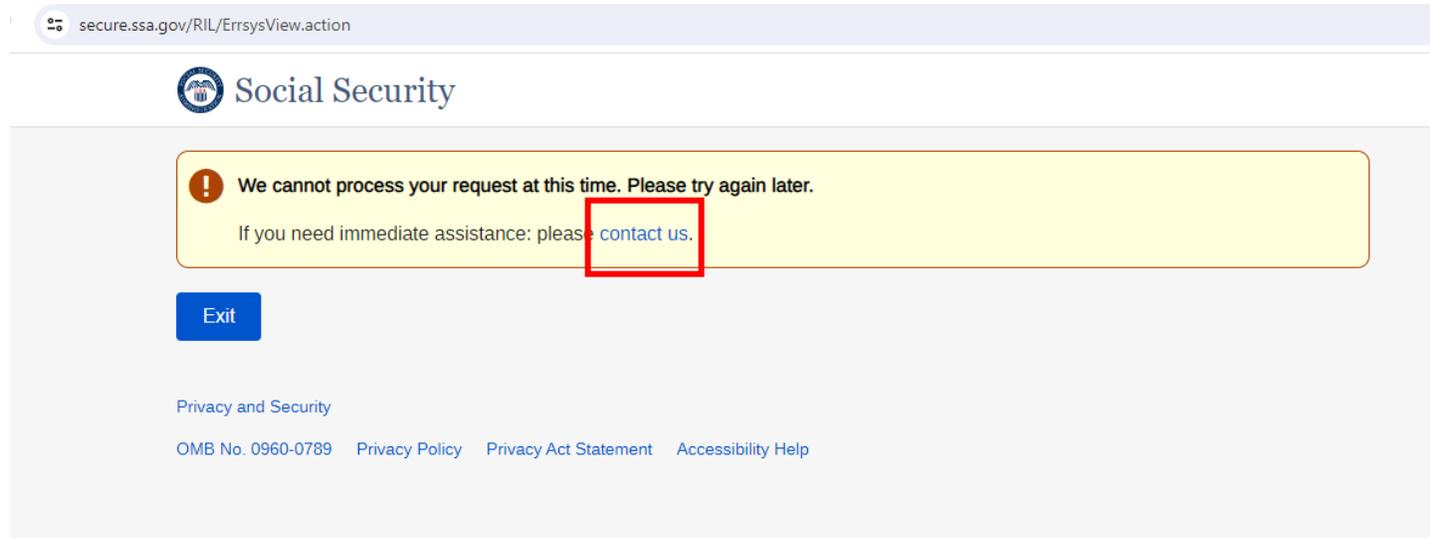
You earned [redacted] in 2023. **Is this correct?**

[Review your full earnings record now](#)

[Learn more about eligibility and work credits](#)

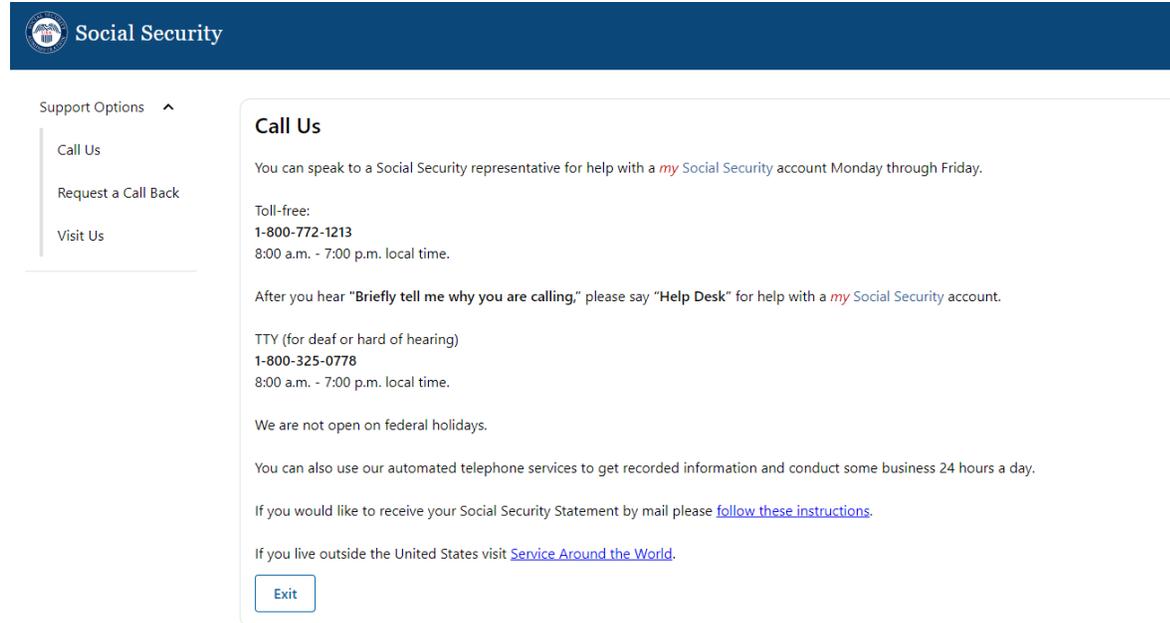
Troubleshooting and Requesting Paper Copies

If a user attempts to login with incorrect information, he or she will see a screen like the one below.



The screenshot shows a web browser address bar with the URL `secure.ssa.gov/RIL/ErrsysView.action`. Below the address bar is the Social Security logo. A yellow error message box contains the text: "We cannot process your request at this time. Please try again later." Below this message is a link labeled "contact us." which is highlighted with a red rectangle. Below the error message is a blue "Exit" button. At the bottom of the page, there are links for "Privacy and Security", "OMB No. 0960-0789", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help".

By clicking “Contact Us,” the user will be taken to the following screen, which is also available at: <https://secure.ssa.gov/cet/contact-us-ui/#/call-us>



The screenshot shows the "Call Us" page on the Social Security website. The page has a dark blue header with the Social Security logo and the text "Social Security". On the left side, there is a "Support Options" menu with a dropdown arrow, containing links for "Call Us", "Request a Call Back", and "Visit Us". The main content area is titled "Call Us" and contains the following text: "You can speak to a Social Security representative for help with a *my* Social Security account Monday through Friday." Below this, it lists the toll-free number "1-800-772-1213" and the hours "8:00 a.m. - 7:00 p.m. local time." It then says "After you hear 'Briefly tell me why you are calling,' please say 'Help Desk' for help with a *my* Social Security account." Below that, it lists the TTY number "1-800-325-0778" and the hours "8:00 a.m. - 7:00 p.m. local time." It also states "We are not open on federal holidays." and "You can also use our automated telephone services to get recorded information and conduct some business 24 hours a day." Below that, it says "If you would like to receive your Social Security Statement by mail please [follow these instructions](#)." and "If you live outside the United States visit [Service Around the World](#)." At the bottom of the main content area is a blue "Exit" button.

As shown on the screen above, the user can dial 1-800-772-1213 to reach SSA customer service. When prompted, the user should say “Help Desk” for assistance with an online account.

A Social Security statement may also be requested by mail by filling out a Form SSA-7004. This form is available at <https://www.ssa.gov/forms/ssa-7004.pdf>.

Social Security Itemized Statement of Earnings - Sample Page

All employers for the requested years are listed with the total Social Security wages reported for each year.

SSA-1826

ITEMIZED STATEMENT OF EARNINGS
* * * FOR SSN XXX-XX-████████ * * *

EMPLOYER NUMBER: ██████████
██████████
██████████
██████████

Each section is for a different employer, listing their tax ID, name, and address.

YEAR	1ST QTR	2ND QTR	3RD QTR	4TH QTR	TOTAL
2002					\$1,004.56
2003					\$75.00

EMPLOYER NUMBER: ██████████
██
██████████
██████████

YEAR	1ST QTR	2ND QTR	3RD QTR	4TH QTR	TOTAL
2002					\$56.70

EMPLOYER NUMBER: ██████████
██
██████████
██████████

YEAR	1ST QTR	2ND QTR	3RD QTR	4TH QTR	TOTAL
2004					\$14,209.41
2005					\$16,525.60

EMPLOYER NUMBER: ██████████
██
██████████
██
██████████

YEAR	1ST QTR	2ND QTR	3RD QTR	4TH QTR	TOTAL
2006					\$5,217.75

EMPLOYER NUMBER: ██████████
██
██
██████████
██████████

YEAR	1ST QTR	2ND QTR	3RD QTR	4TH QTR	TOTAL
2007					\$32,934.00
2008					\$9,859.50



REQUEST FOR SOCIAL SECURITY EARNING INFORMATION

*Use This Form If You Need

1. Certified/Non-Certified Detailed Earnings Information

Includes periods of employment or self-employment and the names and addresses of employers.

2. Certified Yearly Totals of Earnings

Includes total earnings for each year but does not include the names and addresses of employers.

DO NOT USE THIS FORM TO REQUEST
YEARLY EARNINGS TOTALS

Yearly earnings totals are free to the public
if you do not require certification.

To obtain FREE yearly totals of earnings,
visit our website at www.ssa.gov/myaccount.

Privacy Act Statement Collection and Use of Personal Information

Section 205 of the Social Security Act, as amended, allows us to collect this information. In addition, the Budget and Accounting Act of 1950 and Debt Collection Act of 1982 authorize us to collect credit card information, if you choose to pay for the earnings information you have requested with a credit card. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from processing your request.

We will use the information to identify your records, process your request, and send the earnings information you request. We may also share the information for the following purposes, called routine uses:

1. To the Internal Revenue Service (IRS) for auditing SSA's compliance with the safeguard provisions of the Internal Revenue Code of 1986, as amended.
2. To contractors and other Federal agencies, as necessary, for the purpose of, assisting the Social Security Administration (SSA) in the efficient administration of its programs.
3. To banks enrolled in the Treasury credit card network to collect a payment or debt when the individual has given his/her credit card number for this purpose.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notices (SORNs) 60-0059, entitled Earnings Recording and Self-Employment Income System, 60-0090, entitled Master Beneficiary Record, 60-0224, entitled SSA-Initiated Personal Earnings and Benefit Estimate Statement, and 60-0231, entitled Financial Transactions of SSA Accounting and Finance Offices. Additional information and a full listing of all our SORNs are available on our website at www.socialsecurity.gov/foia/bluebook.

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 11 minutes to read the instructions, gather the facts, and answer the questions. **Send only comments relating to our time estimate above to:** SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.

REQUEST FOR SOCIAL SECURITY EARNING INFORMATION

1. Provide your name as it appears on your most recent Social Security card or the name of the individual whose earnings you are requesting.

First Name:	<input type="text"/>	Middle Initial:	<input type="text"/>
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Last Name:	<input type="text"/>
------------	----------------------

Social Security Number (SSN)	<input type="text"/>	<input type="text"/>	<input type="text"/>	One SSN per request
------------------------------	----------------------	----------------------	----------------------	---------------------

Date of Birth:	<input type="text"/>	Date of Death:	<input type="text"/>
----------------	----------------------	----------------	----------------------

Other Name(s) Used
Maiden Name

2. What kind of earnings information do you need? (Choose **ONE** of the following types of earnings or SSA must return this request.)

Itemized Statement of Earnings \$100.00
(Includes the names and addresses of employers)
If you check this box, tell us why you need this information below.

Year(s) Requested:	<input type="text"/>	to	<input type="text"/>
--------------------	----------------------	----	----------------------

Year(s) Requested:	<input type="text"/>	to	<input type="text"/>
--------------------	----------------------	----	----------------------

Check this box if you want the earnings information **CERTIFIED** for an additional \$44.00 fee.

Certified Yearly Totals of Earnings \$44.00
(Does not include the names and addresses of employers) Yearly earnings totals are FREE to the public if you do not require certification. To obtain FREE yearly totals of earnings, visit our website at www.ssa.gov/myaccount.

Year(s) Requested:	<input type="text"/>	to	<input type="text"/>
--------------------	----------------------	----	----------------------

Year(s) Requested:	<input type="text"/>	to	<input type="text"/>
--------------------	----------------------	----	----------------------

3. If you would like this information **sent to someone else**, please fill in the information below.

I authorize the Social Security Administration to release the earnings information to:

Name	
Address	State
City	ZIP Code

4. I am the individual to whom the record pertains (or a person authorized to sign on behalf of that individual). I declare under penalty of perjury that I have examined all the information on this form, and on any accompanying statements or forms, and it is true and correct to the best of my knowledge.

Signature AND Printed Name of Individual or Legal Guardian	SSA must receive this form within 120 days from the date signed
	Date

Relationship (if applicable, you must attach proof)	Daytime Phone:
---	----------------

Address	State
City	ZIP Code

Witnesses must sign this form ONLY if the above signature is by marked (X). If signed by mark (X), two witnesses to the signing who know the signee must sign below and provide their full addresses. Please print the signee's name next to the mark (X) on the signature line above.

1. Signature of Witness	2. Signature of Witness
Address (Number and Street, City, State and ZIP Code)	Address (Number and Street, City, State and ZIP Code)

REQUEST FOR SOCIAL SECURITY EARNING INFORMATION

INFORMATION ABOUT YOUR REQUEST

You may use this form to request earnings information for one ONE Social Security Number (SSN)

How do I get my earnings statement?

You must complete the attached form. Tell us the specific years of earnings you want, type of earnings record, and provide your mailing address. The itemized statement of earnings will be mailed to ONE address, therefore, if you want the statement sent to someone other than yourself, provide their address in section 3. Mail the completed form to SSA within 120 days of signature. If you sign with an "X", your mark must be witnessed by two impartial persons who must provide their name and address in the spaces provided. Select **ONE** type of earnings statement and include the appropriate fee.

1. Certified/Non-Certified Itemized Statement of Earnings

This statement includes years of self-employment or employment and the names and addresses of employers.

2. Certified Yearly Totals of Earnings

This statement includes the total earnings for each year requested but *does not* include the names and addresses of employers.

If you require one of each type of earnings statement, you must complete two separate forms. Mail each form to SSA with one form of payment attached to each request.

How do I get someone else's earnings statement?

You may get someone else's earnings information if you meet one of the following criteria, attach the necessary documents to show your entitlement to the earnings information and include the appropriate fee.

1. Someone Else's Earnings

The natural or adoptive parent or legal guardian of a minor child, or the legal guardian of a legally declared incompetent individual, may obtain earnings information if acting in the best interest of the minor child or incompetent individual. You must include proof of your relationship to the individual with your request. The proof may include a birth certificate, court order, adoption decree, or other legally binding document.

2. A Deceased Person's Earnings

You can request earnings information from the record of a deceased person if you are:

- The legal representative of the estate;
- A survivor (that is, the spouse, parent, child, divorced spouse of divorced parent); or
- An individual with a material interest (e.g., financial) who is an heir at law, next of kin, beneficiary under the will or donee of property of the decedent.

You must include proof of death and proof of your relationship to the deceased with your request.

Is There A Fee For Earnings Information?

Yes. We charge a \$100.00 fee for providing information for purposes unrelated to the administration of our programs.

1. Certified or Non-Certified Itemized Statement of Earnings

In most instances, individuals request Itemized Statements of Earnings for purposes unrelated to our programs such as a private pension plan or personal injury suit. Bulk submitters may email OCO.Pension.Fund@ssa.gov for an alternate method of obtaining itemized earnings information.

We will **certify** the itemized earnings information for an additional \$44.00 fee. Certification is usually not necessary unless you are specifically requested to obtain a certified earnings record.

Sometimes, there is no charge for itemized earnings information. If you have reason to believe your earnings are not correct (for example, you have previously received earnings information from us and it does not agree with your records), we will supply you with more detail for the year(s) in question. Be sure to show the year(s) involved on the request form and explain why you need the information. If you do not tell us why you need the information, we will charge a fee.

2. Certified Yearly Totals of Earnings

We charge \$44.00 to certify yearly totals of earnings. However, if you do not want or need certification, you may obtain yearly totals **FREE** of charge at www.ssa.gov/myaccount. Certification is usually not necessary unless you are advised specifically to obtain a certified earnings record.

Method of Payment

This Fee Is Not Refundable. DO NOT SEND CASH.

- You may pay by credit card, check or money order.
- Credit Card Instructions
Complete the credit card section on page 4 and return it with your request form.
 - Check or Money Order Instructions
Enclose one check or money order per request form payable to the Social Security Administration and write the Social Security number in the memo.

How long will it take SSA to process my request?

Please allow SSA 120 days to process this request. After 120 days, you may contact 1-800-772-1213 to leave an inquiry regarding your request.

REQUEST FOR SOCIAL SECURITY EARNING INFORMATION

• **Where do I send my complete request?**

Mail the completed form, supporting documentation, and applicable fee to: Social Security Administration P.O. Box 33011 Baltimore, Maryland 21290-33011	If using private contractor such as FedEx mail form, supporting documentation, and application fee to: Social Security Administration P.O. Box 33011 Baltimore, Maryland 21290-33011
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• **How much do I have to pay for an Itemized Statement of Earnings?**

Non-Certified Itemized Statement of Earnings	Certified Itemized Statement of Earnings
\$100.00	\$144.00

• **How much do I have to pay for Certified Yearly Totals of Earnings?**

Certified yearly totals of earnings cost \$44.00. You may obtain non-certified yearly totals FREE of charge at www.ssa.gov/myaccount. Certification is usually not necessary unless you are specifically asked to obtain a certified earnings record.

YOU CAN MAKE YOUR PAYMENT BY CREDIT CARD

As a convenience, we offer you the option to make your payment by credit card. However, regular credit card rules will apply. You also pay by check or money order. Make check payable to Social Security Administration.

CHECK ONE	<input type="checkbox"/> Visa <input type="checkbox"/> American Express <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover																				
Credit Card Holder's Name (Enter the name from the credit card)	_____ First Name, Middle Initial, Last Name																				
Credit Card Holder's Address	_____ Number & Street																				
Daytime Telephone Number	_____ City, State, & ZIP Code																				
Credit Card Number	<table style="margin: auto; border: none;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> <td style="border: 1px solid black; width: 20px; height: 20px; display: inline-block;"></td> </tr> </table>																				
Credit Card Expiration Date	_____ (MM/YY)																				
Amount Charged See above to select the correct fee for your request. Applicable fees are \$44.00, \$100.00, or \$144.00. SSA will return forms without the appropriate fee.	\$ _____																				
Credit Card Holder's Signature	_____ Date																				

DO NOT WRITE IN THIS SPACE OFFICE USE ONLY	Authorization	
	Name	Date
	Remittance Control #	

Attachment 2



Transcript Types and Ways to Order Them

Ways to Get Transcripts

You may register to use [Get Transcript Online](#) to view, print, or download all transcript types listed below.

If you're unable to register, or you prefer not to use Get Transcript Online, you may order a **tax return transcript** and/or a **tax account transcript** through [Get Transcript by Mail](#) or by calling [800-908-9946](tel:800-908-9946). Please **allow 5 to 10 calendar days** for delivery.

You may also request any transcript type listed below by submitting [Form 4506-T, Request for Transcript of Tax Return](#).

Transcript Types

We offer the following transcript types at no charge:

- **Tax Return Transcript** - shows most line items from your original Form 1040-series tax return as filed, along with any forms and schedules. It doesn't show changes made after you filed your original return. This transcript is available for the current and three prior tax years. A tax return transcript usually meets the needs of lending institutions offering mortgages. **Note:** The secondary spouse on a joint return can use Get Transcript Online or [Form 4506-T](#) to request this transcript type. When using Get Transcript by Mail or calling [800-908-9946](tel:800-908-9946), the primary taxpayer on the return must make the request.
- **Tax Account Transcript** - shows basic data such as filing status, taxable income, and payment types. It also shows changes made after you filed your original return. This transcript is available for the current and nine prior tax years through Get Transcript Online, and the current and three prior tax years through Get Transcript by Mail or by calling [800-908-9946](tel:800-908-9946). These years and older tax years can be obtained by submitting [Form 4506-T](#). **Note:** If you made estimated tax payments and/or applied an overpayment from a prior year

Related Items

- [Get Transcript](#)
- [Transcript Types and Ways to Order Them](#)
- [Transcript Availability](#)
- [Get Transcript FAQs](#)

return, you can request this transcript type a few weeks after the beginning of the calendar year to confirm your payments prior to filing your tax return.

- **Record of Account Transcript** - combines the tax return and tax account transcripts above into one complete transcript. This transcript is available for the current and three prior tax years using Get Transcript Online or [Form 4506-T](#).
- **Wage and Income Transcript** - shows data from information returns we receive such as Forms W-2, 1098, 1099, and 5498. The transcript is limited to approximately 85 income documents. If you have more documents than that, the transcript will not generate. You'll receive a notification online stating that your transcript request could not be processed and to complete and submit [Form 4506-T](#). If you see a message of "No Record of return filed" for the current tax year, it means information has not populated to the transcript yet. Check back in late May. This transcript is available for the current and nine prior tax years using Get Transcript Online or Form 4506-T.
- **Verification of Non-filing Letter** - states that the IRS has no record of a processed Form 1040-series tax return as of the date of the request. It doesn't indicate whether you are required to file a return for that year. This letter is available after June 15 for the current tax year or anytime for the prior three tax years using Get Transcript Online or [Form 4506-T](#). Use Form 4506-T if you need a letter for older tax years.

Note: A transcript isn't a photocopy of your return. If you need a copy of your original return, submit [Form 4506, Request for Copy of Tax Return](#). Refer to the form for the processing time and fee.

Refer to [Get Transcript FAQs](#) for more information.

[Back to Get Transcript home page](#)

Page Last Reviewed or Updated: 22-Sep-2023

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning , 2023, ending , 20 See separate instructions.

Your first name and middle initial Last name Your social security number

If joint return, spouse's first name and middle initial Last name Spouse's social security number

Home address (number and street). If you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name Foreign province/state/county Foreign postal code You Spouse

Filing Status Single Married filing jointly (even if only one had income) Married filing separately (MFS) Head of household (HOH) Qualifying surviving spouse (QSS) Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) Yes No

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1959 Are blind Spouse: Was born before January 2, 1959 Is blind

Table with 5 columns: (1) First name, Last name, (2) Social security number, (3) Relationship to you, (4) Check the box if qualifies for (see instructions): Child tax credit, Credit for other dependents. Includes 'Dependents' section with instructions.

Income section table with rows 1a through 1z. Includes instructions: Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

Table with rows 2a through 6b. Includes instructions: Attach Sch. B if required.

Table with rows 7 through 15. Includes instructions: Standard Deduction for: Single or Married filing separately, \$13,850; Married filing jointly or Qualifying surviving spouse, \$27,700; Head of household, \$20,800; If you checked any box under Standard Deduction, see instructions.

Tax and Credits	16	Tax (see instructions). Check if any from Form(s): 1 <input type="checkbox"/> 8814 2 <input type="checkbox"/> 4972 3 <input type="checkbox"/> _____	16
	17	Amount from Schedule 2, line 3	17
	18	Add lines 16 and 17	18
	19	Child tax credit or credit for other dependents from Schedule 8812	19
	20	Amount from Schedule 3, line 8	20
	21	Add lines 19 and 20	21
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23
24	Add lines 22 and 23. This is your total tax	24	

Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2	25a	
	b	Form(s) 1099	25b	
	c	Other forms (see instructions)	25c	
	d	Add lines 25a through 25c		25d
	26	2023 estimated tax payments and amount applied from 2022 return		26
	27	Earned income credit (EIC)	27	
	28	Additional child tax credit from Schedule 8812	28	
	29	American opportunity credit from Form 8863, line 8	29	
	30	Reserved for future use	30	
31	Amount from Schedule 3, line 15	31		
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits		32	
33	Add lines 25d, 26, and 32. These are your total payments		33	

Refund	34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34
	35a	Amount of line 34 you want refunded to you . If Form 8888 is attached, check here <input type="checkbox"/>	35a
	b	Routing number: _____ c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
	d	Account number: _____	
36	Amount of line 34 you want applied to your 2024 estimated tax	36	

Amount You Owe	37	Subtract line 33 from line 24. This is the amount you owe . For details on how to pay, go to www.irs.gov/Payments or see instructions	37
	38	Estimated tax penalty (see instructions)	38

Third Party Designee Do you want to allow another person to discuss this return with the IRS? See instructions **Yes**. Complete below. **No**

Designee's name	Phone no.	Personal identification number (PIN)
-----------------	-----------	--------------------------------------

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
Phone no.	Email address		

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: <input type="checkbox"/> Self-employed
Firm's name	Firm's address			Phone no.
Firm's EIN				

Request for Copy of Tax Return

(January 2024)

- ▶ **Do not sign this form unless all applicable lines have been completed.**
- ▶ **Request may be rejected if the form is incomplete or illegible.**
- ▶ **For more information about Form 4506, visit www.irs.gov/form4506.**

OMB No. 1545-0429

Department of the Treasury
Internal Revenue Service

Tip: Get faster service: Online at www.irs.gov, **Get Your Tax Record** (Get Transcript) or by calling **1-800-908-9946** for specialized assistance. We have teams available to assist. **Note:** Taxpayers may register to use [Get Transcript](#) to view, print, or download the following transcript types: **Tax Return Transcript** (shows most line items including Adjusted Gross Income (AGI) from your original Form 1040-series tax return as filed, along with any forms and schedules), **Tax Account Transcript** (shows basic data such as return type, marital status, AGI, taxable income and all payment types), **Record of Account Transcript** (combines the tax return and tax account transcripts into one complete transcript), **Wage and Income Transcript** (shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498), and **Verification of Non-filing Letter** (provides proof that the IRS has no record of a filed Form 1040-series tax return for the year you request).

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number or individual taxpayer identification number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions).	
4 Previous address shown on the last return filed if different from line 3 (see instructions).	
5 If the tax return is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.	

Caution: If the tax return is being sent to the third party, ensure that lines 5 through 7 are completed before signing. (see instructions).

6 Tax return requested. Form 1040, 1120, 941, etc. and all attachments as originally submitted to the IRS, including Form(s) W-2, schedules, or amended returns. Copies of Forms 1040, 1040A, and 1040EZ are generally available for 7 years from filing before they are destroyed by law. Other returns may be available for a longer period of time. Enter only one return number. If you need more than one type of return, you must complete another Form 4506. ▶ _____

Note: If the copies must be certified for court or administrative proceedings, check here

7 Year or period requested. Enter the ending date of the tax year or period using the mm/dd/yyyy format (see instructions).

____ / ____ / ____	____ / ____ / ____	____ / ____ / ____	____ / ____ / ____
____ / ____ / ____	____ / ____ / ____	____ / ____ / ____	____ / ____ / ____

8 Fee. There is a \$30 fee for each return requested. **Full payment must be included with your request or it will be rejected. Make your check or money order payable to "United States Treasury." Enter your SSN, ITIN, or EIN and "Form 4506 request" on your check or money order**

a Cost for each return	\$
b Number of returns requested on line 7	
c Total cost. Multiply line 8a by line 8b	\$

9 If we cannot find the tax return, we will refund the fee. If the refund should go to the third party listed on line 5, check here

Caution: Do not sign this form unless all applicable lines have been complete

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax return requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506 on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506. See instructions

Phone number of taxpayer on line 1a or 2a

Sign Here	▶ Signature (see instructions)	Date
	▶ Print/Type name	Title (if line 1a above is a corporation, partnership, estate, or trust)
	▶ Spouse's signature	Date
	▶ Print/Type name	

Section references are to the Internal Revenue Code unless otherwise noted.

Future Developments

For the latest information about Form 4506 and its instructions, go to www.irs.gov/form4506.

General Instructions

Caution: Do not sign this form unless all applicable lines, including lines 5 through 7, have been completed.

Designated Recipient Notification. Internal Revenue Code, Section 6103(c), limits disclosure and use of return information received pursuant to the taxpayer's consent and holds the recipient subject to penalties for any unauthorized access, other use, or redisclosure without the taxpayer's express permission or request.

Taxpayer Notification. Internal Revenue Code, Section 6103(c), limits disclosure and use of return information provided pursuant to your consent and holds the recipient subject to penalties, brought by private right of action, for any unauthorized access, other use, or redisclosure without your express permission or request.

Purpose of form. Use Form 4506 to request a copy of your tax return. You can also designate (on line 5) a third party to receive the tax return.

How long will it take? It may take up to 75 calendar days for us to process your request.

Where to file. Attach payment and mail Form 4506 to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual returns (Form 1040 series) and one for all other returns.

If you are requesting a return for more than one year or period and the chart below shows two different addresses, send your request based on the address of your most recent return.

Chart for individual returns (Form 1040 series)

If you filed an individual return and lived in:

Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address

Internal Revenue Service
RAIVS Team
Stop 6716 AUCS
Austin, TX 73301

Delaware, Illinois, Indiana, Iowa, Kentucky, Maine, Massachusetts, Minnesota, Missouri, New Hampshire, New Jersey, New York, Vermont, Virginia, Wisconsin

Internal Revenue Service
RAIVS Team
Stop 6705 S-2
Kansas City, MO 64999

Alaska, Arizona, California, Colorado, Connecticut, District of Columbia, Hawaii, Idaho, Kansas, Maryland, Michigan, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oregon, Pennsylvania, Rhode Island, South Dakota, Utah, Washington, West Virginia, Wyoming

Internal Revenue Service
RAIVS Team
P.O. Box 9941
Mail Stop 6734
Ogden, UT 84409

Chart for all other returns

For returns not in Form 1040 series, if the address on the return was in:

Mail to:

Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin

Internal Revenue Service
RAIVS Team
Stop 6705 S-2
Kansas City, MO
64999

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address

Internal Revenue Service
RAIVS Team
P.O. Box 9941
Mail Stop 6734
Ogden, UT 84409

Specific Instructions

Line 1b. Enter the social security number (SSN) or individual taxpayer identification number (ITIN) for the individual listed on line 1a, or enter the employer identification number (EIN) for the business listed on line 1a. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, please include it on this line 3.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note. If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address, or Form 8822-B, Change of Address or Responsible Party — Business, with Form 4506.

Line 7. Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year, fiscal year or quarter. Enter each quarter requested for quarterly returns. Example: Enter 12/31/2018 for a calendar year 2018 Form 1040 return, or 03/31/2017 for a first quarter Form 941 return.

Signature and date. Form 4506 must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506 within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines, including lines 5 through 7, are completed before signing.



You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

Individuals. Copies of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506 exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506 can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506 but must provide documentation to support the requester's right to receive the information.

Partnerships. Generally, Form 4506 can be signed by any person who was a member of the partnership during any part of the tax period requested on line 7.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Note: If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign Form 4506 for a taxpayer only if this authority has been specifically delegated to the representative on Form 2848, line 5a. Form 2848 showing the delegation must be attached to Form 4506.

Privacy Act and Paperwork Reduction Act

Notice. We ask for the information on this form to establish your right to gain access to the requested return(s) under the Internal Revenue Code. We need this information to properly identify the return(s) and respond to your request. If you request a copy of a tax return, sections 6103 and 6109 require you to provide this information, including your SSN or EIN, to process your request. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506 will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form**, 10 min.; **Preparing the form**, 16 min.; and **Copying, assembling, and sending the form to the IRS**, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506 simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service
Tax Forms and Publications Division
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224.

Do not send the form to this address. Instead, see *Where to file* on this page.



This Product Contains Sensitive Taxpayer Data

Tax Return Transcript

Request Date: 08-09-2018
 Response Date: 08-09-2018
 Tracking Number: 100200235179
 Customer File Number: 0987654321

SSN Provided: XXX-XX-5084
Tax Period Ending: Dec. 31, 2017

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

SSN: XXX-XX-5084

SPOUSE SSN:

NAME(S) SHOWN ON RETURN: DRAK

ADDRESS: 123 DA

FILING STATUS: Single
 FORM NUMBER: 1040
 CYCLE POSTED: 20181005
 RECEIVED DATE: Jan.15, 2018
 REMITTANCE: \$0.00
 EXEMPTION NUMBER: 1
 DEPENDENT 1 NAME CTRL:
 DEPENDENT 1 SSN:
 DEPENDENT 2 NAME CTRL:
 DEPENDENT 2 SSN:
 DEPENDENT 3 NAME CTRL:
 DEPENDENT 3 SSN:
 DEPENDENT 4 NAME CTRL:
 DEPENDENT 4 SSN:
 PTIN:
 PREPARER EIN:

Income

WAGES, SALARIES, TIPS, ETC:	\$13,000.00
TAXABLE INTEREST INCOME: SCH B:	\$0.00
TAX-EXEMPT INTEREST:	\$0.00
ORDINARY DIVIDEND INCOME: SCH B:	\$0.00
QUALIFIED DIVIDENDS:	\$0.00
REFUNDS OF STATE/LOCAL TAXES:	\$0.00

ALIMONY RECEIVED:	\$0.00
BUSINESS INCOME OR LOSS (Schedule C):	\$2,500.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:	\$2,500.00
CAPITAL GAIN OR LOSS: (Schedule D):	\$0.00
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:	\$0.00
OTHER GAINS OR LOSSES (Form 4797):	\$0.00
TOTAL IRA DISTRIBUTIONS:	\$0.00
TAXABLE IRA DISTRIBUTIONS:	\$0.00
TOTAL PENSIONS AND ANNUITIES:	\$0.00
TAXABLE PENSION/ANNUITY AMOUNT:	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E):	\$0.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER:	\$0.00
RENT/ROYALTY INCOME/LOSS PER COMPUTER:	\$0.00
ESTATE/TRUST INCOME/LOSS PER COMPUTER:	\$0.00
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER:	\$0.00
FARM INCOME OR LOSS (Schedule F):	\$0.00
FARM INCOME OR LOSS (Schedule F) PER COMPUTER:	\$0.00
UNEMPLOYMENT COMPENSATION:	\$0.00
TOTAL SOCIAL SECURITY BENEFITS:	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS:	\$0.00
TAXABLE SOCIAL SECURITY BENEFITS PER COMPUTER:	\$0.00
OTHER INCOME:	\$0.00
SCHEDULE EIC SE INCOME PER COMPUTER:	\$2,323.00
SCHEDULE EIC EARNED INCOME PER COMPUTER:	\$15,323.00
SCH EIC DISQUALIFIED INC COMPUTER:	\$0.00
TOTAL INCOME:	\$15,500.00
TOTAL INCOME PER COMPUTER:	\$15,500.00

Adjustments to Income

EDUCATOR EXPENSES:	\$0.00
EDUCATOR EXPENSES PER COMPUTER:	\$0.00
RESERVIST AND OTHER BUSINESS EXPENSE:	\$0.00
HEALTH SAVINGS ACCT DEDUCTION:	\$0.00
HEALTH SAVINGS ACCT DEDUCTION PER COMPTR:	\$0.00
MOVING EXPENSES: F3903:	\$0.00
SELF EMPLOYMENT TAX DEDUCTION:	\$177.00
SELF EMPLOYMENT TAX DEDUCTION PER COMPUTER:	\$177.00
SELF EMPLOYMENT TAX DEDUCTION VERIFIED:	\$0.00
KEOGH/SEP CONTRIBUTION DEDUCTION:	\$0.00
SELF-EMP HEALTH INS DEDUCTION:	\$0.00
EARLY WITHDRAWAL OF SAVINGS PENALTY:	\$0.00
ALIMONY PAID SSN:	
ALIMONY PAID:	\$0.00
IRA DEDUCTION:	\$0.00
IRA DEDUCTION PER COMPUTER:	\$0.00
STUDENT LOAN INTEREST DEDUCTION:	\$0.00
STUDENT LOAN INTEREST DEDUCTION PER COMPUTER:	\$0.00
STUDENT LOAN INTEREST DEDUCTION VERIFIED:	\$0.00
TUITION AND FEES DEDUCTION:	\$0.00
TUITION AND FEES DEDUCTION PER COMPUTER:	\$0.00
DOMESTIC PRODUCTION ACTIVITIES DEDUCTION:	\$0.00

DOMESTIC PRODUCTION ACTIVITIES DEDUCTION PER COMPUTER:	\$0.00
OTHER ADJUSTMENTS:	\$0.00
ARCHER MSA DEDUCTION:	\$0.00
ARCHER MSA DEDUCTION PER COMPUTER:	\$0.00
TOTAL ADJUSTMENTS:	\$177.00
TOTAL ADJUSTMENTS PER COMPUTER:	\$177.00
ADJUSTED GROSS INCOME:	\$15,323.00
ADJUSTED GROSS INCOME PER COMPUTER:	\$15,323.00

Tax and Credits

65-OR-OVER:	NO
BLIND:	NO
SPOUSE 65-OR-OVER:	NO
SPOUSE BLIND:	NO
STANDARD DEDUCTION PER COMPUTER:	\$4,850.00
ADDITIONAL STANDARD DEDUCTION PER COMPUTER:	\$0.00
TAX TABLE INCOME PER COMPUTER:	\$10,473.00
EXEMPTION AMOUNT PER COMPUTER:	\$3,100.00
TAXABLE INCOME:	\$7,373.00
TAXABLE INCOME PER COMPUTER:	\$7,373.00
TOTAL POSITIVE INCOME PER COMPUTER:	\$15,500.00
TENTATIVE TAX:	\$749.00
TENTATIVE TAX PER COMPUTER:	\$749.00
FORM 8814 ADDITIONAL TAX AMOUNT:	\$0.00
TAX ON INCOME LESS SOC SEC INCOME PER COMPUTER:	\$0.00
FORM 6251 ALTERNATIVE MINIMUM TAX:	\$0.00
FORM 6251 ALTERNATIVE MINIMUM TAX PER COMPUTER:	\$0.00
FOREIGN TAX CREDIT:	\$0.00
FOREIGN TAX CREDIT PER COMPUTER:	\$0.00
FOREIGN INCOME EXCLUSION PER COMPUTER:	\$0.00
FOREIGN INCOME EXCLUSION TAX PER COMPUTER:	\$0.00
EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT AMOUNT:	\$0.00
EXCESS ADVANCE PREMIUM TAX CREDIT REPAYMENT VERIFIED AMOUNT:	\$0.00
CHILD & DEPENDENT CARE CREDIT:	\$0.00
CHILD & DEPENDENT CARE CREDIT PER COMPUTER:	\$0.00
CREDIT FOR ELDERLY AND DISABLED:	\$0.00
CREDIT FOR ELDERLY AND DISABLED PER COMPUTER:	\$0.00
EDUCATION CREDIT:	\$0.00
EDUCATION CREDIT PER COMPUTER:	\$0.00
GROSS EDUCATION CREDIT PER COMPUTER:	\$0.00
RETIREMENT SAVINGS CNTRB CREDIT:	\$0.00
RETIREMENT SAVINGS CNTRB CREDIT PER COMPUTER:	\$0.00
PRIM RET SAV CNTRB: F8880 LN6A:	\$0.00
SEC RET SAV CNTRB: F8880 LN6B:	\$0.00
TOTAL RETIREMENT SAVINGS CONTRIBUTION: F8880 CMPTR:	\$0.00
RESIDENTIAL ENERGY CREDIT:	\$0.00
RESIDENTIAL ENERGY CREDIT PER COMPUTER:	\$0.00
CHILD TAX CREDIT:	\$0.00
CHILD TAX CREDIT PER COMPUTER:	\$0.00
ADOPTION CREDIT: F8839:	\$0.00
ADOPTION CREDIT PER COMPUTER:	\$0.00

FORM 8396 MORTGAGE CERTIFICATE CREDIT:	\$0.00
FORM 8396 MORTGAGE CERTIFICATE CREDIT PER COMPUTER:	\$0.00
F3800, F8801 AND OTHER CREDIT AMOUNT:	\$0.00
FORM 3800 GENERAL BUSINESS CREDITS:	\$0.00
FORM 3800 GENERAL BUSINESS CREDITS PER COMPUTER:	\$0.00
PRIOR YR MIN TAX CREDIT: F8801:	\$0.00
PRIOR YR MIN TAX CREDIT: F8801 PER COMPUTER:	\$0.00
F8936 ELECTRIC MOTOR VEHICLE CREDIT AMOUNT:	\$0.00
F8936 ELECTRIC MOTOR VEHICLE CREDIT PER COMPUTER:	\$0.00
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT AMOUNT:	\$0.00
F8910 ALTERNATIVE MOTOR VEHICLE CREDIT PER COMPUTER:	\$0.00
OTHER CREDITS:	\$0.00
TOTAL CREDITS:	\$0.00
TOTAL CREDITS PER COMPUTER:	\$0.00
INCOME TAX AFTER CREDITS PER COMPUTER:	\$749.00

Other Taxes

SE TAX:	\$354.00
SE TAX PER COMPUTER:	\$354.00
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS:	\$0.00
SOCIAL SECURITY AND MEDICARE TAX ON UNREPORTED TIPS PER COMPUTER:	\$0.00
TAX ON QUALIFIED PLANS F5329 (PR):	\$0.00
TAX ON QUALIFIED PLANS F5329 PER COMPUTER:	\$0.00
IRAF TAX PER COMPUTER:	\$0.00
TP TAX FIGURES (REDUCED BY IRAF) PER COMPUTER:	\$1,103.00
IMF TOTAL TAX (REDUCED BY IRAF) PER COMPUTER:	\$1,103.00
OTHER TAXES PER COMPUTER:	\$0.00
UNPAID FICA ON REPORTED TIPS:	\$0.00
OTHER TAXES:	\$0.00
RECAPTURE TAX: F8611:	\$0.00
HOUSEHOLD EMPLOYMENT TAXES:	\$0.00
HOUSEHOLD EMPLOYMENT TAXES PER COMPUTER:	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY:	\$0.00
HEALTH CARE RESPONSIBILITY PENALTY VERIFIED:	\$0.00
HEALTH COVERAGE RECAPTURE: F8885:	\$0.00
RECAPTURE TAXES:	\$0.00
TOTAL ASSESSMENT PER COMPUTER:	\$1,103.00
TOTAL TAX LIABILITY TP FIGURES:	\$1,103.00
TOTAL TAX LIABILITY TP FIGURES PER COMPUTER:	\$1,103.00

Payments

FEDERAL INCOME TAX WITHHELD:	\$1,000.00
HEALTH CARE: INDIVIDUAL RESPONSIBILITY:	\$0.00
HEALTH CARE FULL-YEAR COVERAGE INDICATOR:	0
ESTIMATED TAX PAYMENTS:	\$0.00
OTHER PAYMENT CREDIT:	\$0.00
REFUNDABLE EDUCATION CREDIT:	\$0.00
REFUNDABLE EDUCATION CREDIT PER COMPUTER:	\$0.00
REFUNDABLE EDUCATION CREDIT VERIFIED:	\$0.00
EARNED INCOME CREDIT:	\$0.00
EARNED INCOME CREDIT PER COMPUTER:	\$0.00
EARNED INCOME CREDIT NONTAXABLE COMBAT PAY:	\$0.00

SCHEDULE 8812 NONTAXABLE COMBAT PAY:	\$0.00
EXCESS SOCIAL SECURITY & RRTA TAX WITHHELD:	\$0.00
SCHEDULE 8812 TOT SS/MEDICARE WITHHELD:	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT:	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT PER COMPUTER:	\$0.00
SCHEDULE 8812 ADDITIONAL CHILD TAX CREDIT VERIFIED:	\$0.00
AMOUNT PAID WITH FORM 4868:	\$0.00
FORM 2439 REGULATED INVESTMENT COMPANY CREDIT:	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS:	\$0.00
FORM 4136 CREDIT FOR FEDERAL TAX ON FUELS PER COMPUTER:	\$0.00
HEALTH COVERAGE TX CR: F8885:	\$0.00
PREMIUM TAX CREDIT AMOUNT:	\$0.00
PREMIUM TAX CREDIT VERIFIED AMOUNT:	\$0.00
PRIMARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:	\$0.00
SECONDARY NAP FIRST TIME HOME BUYER INSTALLMENT AMT:	\$0.00
FIRST TIME HOMEBUYER CREDIT REPAYMENT AMOUNT:	\$0.00
FORM 5405 TOTAL HOMEBUYERS CREDIT REPAYMENT PER COMPUTER:	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER:	\$0.00
SMALL EMPLOYER HEALTH INSURANCE PER COMPUTER (2):	\$0.00
FORM 2439 AND OTHER CREDITS:	\$0.00
TOTAL PAYMENTS:	\$1,000.00
TOTAL PAYMENTS PER COMPUTER:	\$1,000.00

Refund or Amount Owed

AMOUNT YOU OWE:	\$103.00
APPLIED TO NEXT YEAR'S ESTIMATED TAX:	\$0.00
ESTIMATED TAX PENALTY:	\$0.00
TAX ON INCOME LESS STATE REFUND PER COMPUTER:	\$0.00
BAL DUE/OVER PYMT USING TP FIG PER COMPUTER:	\$103.00
BAL DUE/OVER PYMT USING COMPUTER FIGURES:	\$103.00
FORM 8888 TOTAL REFUND PER COMPUTER:	\$0.00

Third Party Designee

THIRD PARTY DESIGNEE ID NUMBER:	
AUTHORIZATION INDICATOR:	0
THIRD PARTY DESIGNEE NAME:	

Schedule C--Profit or Loss From Business

SOCIAL SECURITY NUMBER:	
EMPLOYER ID NUMBER:	
BUSINESS NAME:	
DESCRIPTION OF BUSINESS/PROFESSION:	DRAK
NAICS CODE:	000000
ACCT MTHD:	
FIRST TIME SCHEDULE C FILED:	N
STATUTORY EMPLOYEE IND:	N

INCOME

GROSS RECEIPTS OR SALES:	\$2,700.00
RETURNS AND ALLOWANCES:	\$0.00
NET GROSS RECEIPTS:	\$0.00
COST OF GOODS SOLD:	\$0.00
SCHEDULE C FORM 1099 REQUIRED:	NONE

SCHEDULE C FORM 1099 FILED: NONE
 OTHER INCOME: \$0.00

EXPENSES

CAR AND TRUCK EXPENSES: \$0.00
 DEPRECIATION: \$0.00
 INSURANCE (OTHER THAN HEALTH): \$0.00
 MORTGAGE INTEREST: \$0.00
 LEGAL AND PROFESSIONAL SERVICES: \$0.00
 REPAIRS AND MAINTENANCE: \$0.00
 TRAVEL: \$0.00
 MEALS AND ENTERTAINMENT: \$0.00
 WAGES: \$0.00
 OTHER EXPENSES: \$0.00
 TOTAL EXPENSES: \$200.00
 EXP FOR BUSINESS USE OF HOME: \$0.00
 SCH C NET PROFIT OR LOSS PER COMPUTER: \$2,500.00
 AT RISK CD:
 OFFICE EXPENSE AMOUNT: \$0.00
 UTILITIES EXPENSE AMOUNT: \$0.00
COST OF GOODS SOLD
 INVENTORY AT BEGINNING OF YEAR: \$0.00
 INVENTORY AT END OF YEAR: \$0.00

Schedule SE--Self-Employment Tax

SSN OF SELF-EMPLOYED TAXPAYER: XXX-XX-5084
 NET FARM PROFIT/LOSS: SCH F: \$0.00
 CONSERVATION RESERVE PROGRAM PAYMENTS: \$0.00
 NET NONFARM PROFIT/LOSS: \$2,500.00
 TOTAL SE INCOME: \$2,500.00
 SE QUARTERS COVERED: 4
 TOTAL SE TAX PER COMPUTER: \$353.12
 SE INCOME COMPUTER VERIFIED: \$0.00
 SE INCOME PER COMPUTER: \$2,308.00
 TOTAL NET EARNINGS PER COMPUTER: \$2,308.00

LONG FORM ONLY

TENTATIVE CHURCH EARNINGS: \$0.00
 TOTAL SOC SEC & RR WAGES: \$0.00
 SE SS TAX COMPUTER: \$286.19
 SE MEDICARE INCOME PER COMPUTER: \$2,308.00
 SE MEDICARE TAX PER COMPUTER: \$66.93
 SE FARM OPTION METHOD USED: 0
 SE OPTIONAL METHOD INCOME: \$0.00

Form 8863 - Education Credits (Hope and Lifetime Learning Credits)**PART III - ALLOWABLE EDUCATION CREDITS**

GROSS EDUCATION CR PER COMPUTER: \$0.00
 TOTAL EDUCATION CREDIT AMOUNT: \$0.00
 TOTAL EDUCATION CREDIT AMOUNT PER COMPUTER: \$0.00

This Product Contains Sensitive Taxpayer Data



Internal Revenue Service
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date: 04-08-2016
Response Date: 06-08-2016
Tracking Number: [REDACTED]

Wage and Income Transcript

SSN Provided: [REDACTED]
Tax Period Requested: December, 2013



023898

Form W-2 Wage and Tax Statement

Employer:
Employer Identification Number (EIN): [REDACTED]
[REDACTED]
[REDACTED]

Employee:
Employee's Social Security Number: [REDACTED]
[REDACTED]
[REDACTED]

Submission Type:.....Original document
Wages, Tips and Other Compensation:.....[REDACTED]
Federal Income Tax Withheld:.....[REDACTED]
Social Security Wages:.....[REDACTED]
Social Security Tax Withheld:.....[REDACTED]
Medicare Wages and Tips:.....[REDACTED]
Medicare Tax Withheld:.....[REDACTED]
Social Security Tips:.....[REDACTED]
Allocated Tips:.....[REDACTED]
Dependent Care Benefits:.....[REDACTED]
Deferred Compensation:.....[REDACTED]
Code "Q" Nontaxable Combat Pay:.....[REDACTED]
Code "W" Employer Contributions to a Health Savings Account:.....[REDACTED]
Code "Y" Deferrals under a section 409A nonqualified Deferred Compensation plan:.....[REDACTED]
Code "Z" Income under section 409A on a nonqualified Deferred Compensation plan:.....\$0.00
Code "R" Employer's Contribution to MSA:.....\$0.00
Code "S" Employer's Contribution to Simple Account:.....\$0.00
Code "T" Expenses Incurred for Qualified Adoptions:.....\$0.00
Code "V" Income from exercise of non-statutory stock options:.....\$0.00
Code "AA" Designated Roth Contributions under a Section 401(k) Plan:.....\$0.00
Code "BB" Designated Roth Contributions under a Section 403(b) Plan:.....\$0.00
Code "DD" Cost of Employer-Sponsored Health Coverage:.....\$0.00
Code "EE" Designated ROTH Contributions Under a Governmental Section 457(b) Plan:.....\$0.00
Third Party Sick Pay Indicator:.....Unanswered
Retirement Plan Indicator:.....Yes
Statutory Employee:.....Not Statutory Employee
W2 Submission Type:.....Original
W2 WHC SSN Validation Code:.....

[REDACTED]
[REDACTED]
[REDACTED]

Request for Transcript of Tax Return

- ▶ Do not sign this form unless all applicable lines have been completed.
- ▶ Request may be rejected if the form is incomplete or illegible.
- ▶ For more information about Form 4506-T, visit www.irs.gov/form4506t.

Tip: Get faster service: Online at www.irs.gov, **Get Your Tax Record** (Get Transcript) or by calling **1-800-908-9946** for specialized assistance. We have teams available to assist. **Note:** Taxpayers may register to use [Get Transcript](#) to view, print, or download the following transcript types: **Tax Return Transcript** (shows most line items including Adjusted Gross Income (AGI) from your original Form 1040-series tax return as filed, along with any forms and schedules), **Tax Account Transcript** (shows basic data such as return type, marital status, AGI, taxable income and all payment types), **Record of Account Transcript** (combines the tax return and tax account transcripts into one complete transcript), **Wage and Income Transcript** (shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498), and **Verification of Non-filing Letter** (provides proof that the IRS has no record of a filed Form 1040-series tax return for the year you request).

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number or individual taxpayer identification number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	
4 Previous address shown on the last return filed if different from line 3 (see instructions)	
5 Customer file number (if applicable) (see instructions)	

Note: Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

6 Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ _____

a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days

b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days

c Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 Year or period requested. Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year, fiscal year or quarter. Enter each quarter requested for quarterly returns. Example: Enter 12/31/2018 for a calendar year 2018 Form 1040 transcript.

/	/	/	/
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Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions.

Signature (see instructions)	Date
Title (if line 1a above is a corporation, partnership, estate, or trust)	
Spouse's signature	Date

Phone number of taxpayer on line 1a or 2a

Section references are to the Internal Revenue Code unless otherwise noted.

Future Developments

For the latest information about Form 4506-T and its instructions, go to www.irs.gov/form4506t. Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

The filing location for the Form 4506-T has changed. **Please see Chart for individual transcripts or Chart for all other transcripts** for the correct mailing location.

What's New. As part of its ongoing efforts to protect taxpayer data, the Internal Revenue Service announced that in July 2019, it will stop all third-party mailings of requested transcripts. After this date masked Tax Transcripts will only be mailed to the taxpayer's address of record.

If a third-party is unable to accept a Tax Transcript mailed to the taxpayer, they may either contract with an existing IVES participant or become an IVES participant themselves. For additional information about the IVES program, go to www.irs.gov and search IVES.

General Instructions

Caution: Do not sign this form unless all applicable lines have been completed.

Purpose of form. Use Form 4506-T to request tax return information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

Note: If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

Customer File Number. The transcripts provided by the IRS have been modified to protect taxpayers' privacy. Transcripts only display partial personal information, such as the last four digits of the taxpayer's Social Security Number. Full financial and tax information, such as wages and taxable income, are shown on the transcript.

An optional Customer File Number field is available to use when requesting a transcript. This number will print on the transcript. See Line 5 instructions for specific requirements. The customer file number is an optional field and not required.

Tip. Use Form 4506. Request for Copy of Tax Return, to request copies of tax returns.

Automated transcript request. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-9946.

Where to file. Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart shows two different addresses, send your request to the address based on the address of your most recent return.

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, include it on this line.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note: If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party — Business.

Line 5. Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number **should not** contain an SSN. Completion of this line is not required.

Note. If you use an SSN, name or combination of both, we will not input the information and the customer file number will reflect a generic entry of "9999999999" on the transcript.

Line 6. Enter only one tax form number per request.

Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.

Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester's right to receive the information.

Partnerships. Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Note: If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign Form 4506-T for a taxpayer only if the taxpayer has specifically delegated this authority to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4506-T.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form, 10 min.; Preparing the form, 12 min.; and Copying, assembling, and sending the form to the IRS, 20 min.**

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service
Tax Forms and Publications Division
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.

Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:	Mail or fax to:
Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team Stop 6716 AUSC Austin, TX 73301 855-587-9604
Delaware, Illinois, Indiana, Iowa, Kentucky, Maine, Massachusetts, Minnesota, Missouri, New Hampshire, New Jersey, New York, Vermont, Virginia, Wisconsin	Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999 855-821-0094
Alaska, Arizona, California, Colorado, Connecticut, District of Columbia, Hawaii, Idaho, Kansas, Maryland, Michigan, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oregon, Pennsylvania, Rhode Island, South Dakota, Utah, Washington, West Virginia, Wyoming	Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409 855-298-1145

Chart for all other transcripts

If you lived in or your business was in:	Mail or fax to:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409 855-298-1145
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin	Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999 855-821-0094



You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

Attachment 3

22222		a Employee's social security number 111-11-1111		OMB No. 1545-0008		
b Employer identification number (EIN) 99-9999999		1 Wages, tips, other compensation 106000.00		2 Federal income tax withheld 14000.00		
c Employer's name, address, and ZIP code Employer Name, Inc. 1234 Main Street Anycity, TX 76543		3 Social security wages 118500.00		4 Social security tax withheld 7347.00		
		5 Medicare wages and tips 128000.00		6 Medicare tax withheld 1856.00		
		7 Social security tips		8 Allocated tips		
d Control number		9		10 Dependent care benefits		
e Employee's first name and initial Ellen L Last name Employee Suff. . . 567 Pine Street Anytown, TX 78910		11 Nonqualified plans		12a W 7500.00		
		13 Statutory employee <input type="checkbox"/> Retirement plan <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b DD 11000.00		
		14 Other		12c D 22000.00		
				12d		
f Employee's address and ZIP code						
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Form **W-2** Wage and Tax Statement
Copy 1—For State, City, or Local Tax Department

2015

Department of the Treasury—Internal Revenue Service

Details regarding Ellen Employee's 2015 earnings and W-2:

Ellen is a high earner, earning more than the maximum wages subject to Social Security taxes. She and her employer share the cost of her family's health insurance. She has a health savings account (HSA) to which her employer makes contributions. She contributes to a 401(K) to which her employer also contributes. She is over 50, and so can contribute "catch-up" amounts in both her HSA and her 401(K). She receives periodic bonuses.		
Gross pay	\$140,000	not on W-2
Less: health insurance paid by Ellen	(\$5,000)	not on W-2
Less: health savings account contributions made by Ellen	(\$7,000)	not on W-2
Medicare wages and tips	\$128,000	W-2 Box 5
Less: 401(K) contributions made by Ellen	(\$22,000)	W-2 Box 12 Code D
Wages, tips, other compensation	\$106,000	W-2 Box 1
Other amounts which appear on Ellen's W-2:		
Federal income tax withheld	\$14,000	W-2 Box 2
Social security wages - maximum for 2015	\$118,500	W-2 Box 3
Social security tax withheld (6.2% of Social security wages)	\$7,347	W-2 Box 4
Medicare tax withheld (1.45% of Medicare wages)	\$1,856	W-2 Box 6
Retirement plan checked: Ellen participates in Employer's plan		
HSA: total contributions by both Ellen and Employer	\$7,500	W-2 Box 12 Code W
Insurance: total paid by both Ellen and Employer	\$11,000	W-2 Box 12 Code DD
What we don't know from Ellen's W-2:		
Gross wages, pay rate, amount of regular pay and amount of bonuses		
HSA: split between Ellen's contributions and Employer's contributions		
Insurance: split between Ellen's payments and Employer's payments		
401(K): Employer's match, % or amount		

22222		a Employee's social security number 222-22-2222		OMB No. 1545-0008	
b Employer identification number (EIN) 99-9999999			1 Wages, tips, other compensation 50000.00		2 Federal income tax withheld 2300.00
c Employer's name, address, and ZIP code Employer Name, Inc. 1234 Main Street Anycity, TX 76543			3 Social security wages 50000.00		4 Social security tax withheld 3100.00
			5 Medicare wages and tips 50000.00		6 Medicare tax withheld 725.00
			7 Social security tips		8 Allocated tips
d Control number			9		10 Dependent care benefits
e Employee's first name and initial Steven R		Last name Staff	Suff.	11 Nonqualified plans	
f Employee's address and ZIP code 89 Road Ave. Anycity, TX 76540			13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12a Code DD 11000.00
			14 Other		12b
					12c
					12d
15 State	Employer's state ID number		16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.
			19 Local income tax	20 Locality name	

Form **W-2** Wage and Tax Statement
Copy 1—For State, City, or Local Tax Department

2015

Department of the Treasury—Internal Revenue Service

Details regarding Steven Staff's 2015 earnings and W-2:

Steven's W-2 shows identical amounts for all three types of wages (Boxes 1, 3, 5): Wages (subject to income tax), Social security, and Medicare. Steven receives hourly pay and has no other form of compensation. He occasionally works overtime. He and his employer share the cost of his family's health insurance. He does not participate in the Employer's 401(K).

Gross pay	\$55,000	not on W-2
Less: health insurance paid by Steven	(\$5,000)	not on W-2
Medicare wages and tips		W-2 Box 5
Social security wages	\$50,000	W-2 Box 3
Wages, tips, other compensation		W-2 Box 1
Other amounts which appear on Steven's W-2:		
Federal income tax withheld	\$2,300	W-2 Box 2
Social security tax withheld (6.2% of Social security wages)	\$3,100	W-2 Box 4
Medicare tax withheld (1.45% of Medicare wages)	\$725	W-2 Box 6
Insurance: total paid by both Steven and Employer	\$11,000	W-2 Box 12 Code DD

What we don't know from Steven's W-2:

Gross wages, pay rate, amount of regular pay and amount of overtime
Even when all three wages boxes (1, 3, 5) are the same, we don't necessarily know gross wages.
Insurance: split between Steven's payments and Employer's payments

Attachment 4

9595

VOID

CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Rents		OMB No. 1545-0115	
		\$		Form 1099-MISC	
		2 Royalties		(Rev. January 2024)	
PAYER'S TIN		RECIPIENT'S TIN		For calendar year	
		\$		_____	
		3 Other income		4 Federal income tax withheld	
PAYER'S name		5 Fishing boat proceeds		6 Medical and health care payments	
Street address (including apt. no.)		\$		\$	
City or town, state or province, country, and ZIP or foreign postal code		7 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/>		8 Substitute payments in lieu of dividends or interest	
RECIPIENT'S name		9 Crop insurance proceeds		10 Gross proceeds paid to an attorney	
Account number (see instructions)		11 Fish purchased for resale		12 Section 409A deferrals	
2nd TIN not. <input type="checkbox"/>		\$		\$	
13 FATCA filing requirement <input type="checkbox"/>		14 Excess golden parachute payments		15 Nonqualified deferred compensation	
16 State tax withheld		\$		17 State/Payer's state no.	
18 State income		\$		\$	

Miscellaneous Information

**Copy A
For
Internal Revenue
Service Center**

**File with Form 1096.
For Privacy Act
and Paperwork
Reduction Act
Notice, see the
current General
Instructions for
Certain
Information
Returns.**

Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page

7171

VOID

CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.	OMB No. 1545-0116	
		Form 1099-NEC
		(Rev. January 2024) For calendar year _____

Nonemployee Compensation

PAYER'S TIN	RECIPIENT'S TIN	1 Nonemployee compensation \$	Copy A For Internal Revenue Service Center File with Form 1096. For Privacy Act and Paperwork Reduction Act Notice, see the current General Instructions for Certain Information Returns.	
RECIPIENT'S name		2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/>		
Street address (including apt. no.)		3		
City or town, state or province, country, and ZIP or foreign postal code		4 Federal income tax withheld \$		
Account number (see instructions)	2nd TIN not. <input type="checkbox"/>	5 State tax withheld		6 State/Payer's state no.
		\$		\$
		\$		\$
		7 State income		

Attachment 5

Researching Wage Information Using the Dictionary of Occupational Titles

The first step in obtaining the statistical wages for a specific job is to use the Dictionary of Occupational Titles (DOT) to determine the proper Standard Occupational Classification (SOC) code. This is done by accessing the DOT at <https://occupationalinfo.org/> and performing a search for the job of interest.

For example, if we are interested in analyzing the earnings of a welder-fitter, we will type welder-fitter into the search bar and select the proper job from the search results, which will bring us to the following screen:

The screenshot shows the Dictionary of Occupational Titles (DOT) website interface. On the left is a navigation grid with letters A through Z and a question mark. The main content area displays the search results for 'Welder-Fitter'. At the top, there is a navigation bar with links for '<Previous', 'Next >', 'Search', 'Contents', 'ONET NEW', 'Link to this page', and 'About'. Below this is a search bar with the text 'ENHANCED BY Google' and a search icon. The search results show the following information:

- CODE: 819.361-010
- Buy the DOT: [Download](#)
- TITLE(s): **WELDER-FITTER (welding)**
- Description: Lays out, fits, and welds fabricated, cast, and forged components to assemble structural forms, such as machinery frames, tanks, pressure vessels, furnace shells, and building and bridge parts, according to blueprints and knowledge of welding and metallurgy: Selects equipment and plans layout, assembly, and welding, applying knowledge of geometry, physical properties of metal machining weld shrinkage, and welding techniques. Lays out, positions, aligns, and fits components together. Bolts, clamps, and tack-welds parts to secure in position for welding [WELDER, TACK (welding)]. Sets up equipment and welds parts, using arc, gas-shielded arc, submerged arc, or gas welding equipment [WELDER, COMBINATION (welding)]. May assemble parts by bolting and riveting. May repair products by dismantling, straightening, reshaping, and reassembling parts, using cutting torch, straightening press, and handtools, and be designated Welder, Structural Repair (welding). May specialize in using one welding process and be designated Welder-Fitter, Arc (welding); Welder-Fitter, Gas (welding). May specialize in fitting and welding components of metal tools, dies, and fixtures and be designated Welder, Tool And Die (welding).
- GOE: 05.05.06 STRENGTH: M GED: R4 M3 L3 SVP: 7 DLU: 77
- ONET CROSSWALK: [93914C Welder-Fitters](#)

Next, we will click on “Welder-Fitters” to obtain the representative SOC code and job title needed to determine the wage statistics from the U.S. Department of Labor Bureau of Labor Statistics (BLS). The proper SOC code and job title can be found at the bottom of the page.

CROSSWALKS:

DOT91 (Dictionary of Occupational Titles):

[819361014 Welder-Fitter Apprentice](#)
[819381010 Welder-Assembler](#)
[819361010 Welder-Fitter](#)
[819281022 Welder, Experimental](#)
[819281010 Lead Burner](#)
[819281014 Lead-Burner Apprentice](#)

AIM97 (Apprenticeship Information Management):

0274 LEAD BURNER
0627 WELDER-FITTER

CEN90 (1990 Census Occupations):

783 Welders and Cutters

CIP90 (Classification of Instructional Programs):

480508 Welder/Welding Technologist

GOE93 (Guide for Occupational Exploration):

050506 Craft Technology: Metal Fabrication and Repair

MOC97 (Military Occupational Codes):

SW Steelworkers
2A731 Aircraft Metals Technology
2A751 Aircraft Metals Technology

OES98 (Occupational Employment Statistics):

93914 Welders and Cutters

OPM97 (Office of Personnel Management Occupations):

3716 Leadburning
3703 Welding
3702 Flame/Arc Cutting

SOC98 (Standard Occupational Classification):

51-4121 Welders, Cutters, Solderers, and Brazers

In this instance, we will search the BLS website for the SOC code: 51-4121 and job title: welders, cutters, solderers, and brazers.

The BLS earnings statistics for specific jobs can be accessed at <https://www.bls.gov/bls/blswage.htm>. This website will bring the expert to the following webpage:



Overview of BLS Wage Data by Area and Occupation

BLS wage data are available by occupation for the [nation](#), [regions](#), [states](#), and many [metropolitan and nonmetropolitan areas](#).

National Wage Data

- [For over 800 occupations](#). Data are classified using the [Standard Occupational Classification \(SOC\)](#) System.
- [Data by job characteristics](#) and the level of difficulty and complexity of work.
- [For about 400 industries](#). Occupational wage data for sector, 3-, 4- and 5-digit [North American Industry Classification System \(NAICS\)](#) industries.
- [Data by occupation and gender](#) Data for men and for women in 200 occupations.

Wage Data by State

- [By state](#). 50 states plus District of Columbia, Guam, Puerto Rico, and Virgin Islands.
- [Data by job characteristics](#) and the level of difficulty and complexity of work. (Guam, Puerto Rico, and Virgin Islands excluded).

Wage Data by Metropolitan Area

- [For 395 metropolitan statistical areas \(MSAs\) and over 130 nonmetropolitan areas](#). (MSAs consist of one or more counties (or towns and cities in New England) and contain a core area with a substantial population that has a high degree of economic and social integration with the surrounding areas; also, an MSA must have at least one urbanized area of 50,000 or more inhabitants. Certain MSAs have subdivisions called metropolitan divisions.
- [Data by job characteristics](#) and the level of difficulty and complexity of work. (Guam, Puerto Rico, and Virgin Islands excluded).

BLS wage data by area and occupation are from the [National Compensation Survey](#), [Occupational Employment Statistics Survey](#), or the [Current Population Survey](#).

Other BLS programs that publish wage data (though not by detailed occupation) are [Employment Cost Trends](#), [Current Employment Statistics](#), and [Quarterly Census of Employment and Wages](#).

BLS Overviews

[Business Costs](#) | [Demographic Data](#) | [Employment](#) | [Geography](#) | [Industry](#) | [Inflation and Prices](#) | [International Data and Technical Cooperation](#) | [Occupation](#) | [Pay and Benefits](#) | [Productivity](#) | [Research Programs](#) | [Spending and Time Use](#) | [Unemployment](#) | **[Wages by Area and Occupation](#)** | [Women Workers](#) | [Worker Safety and Health](#)

From this page we can search for the statistical wages for a welder-fitter based on location. If the welder-fitter worked construction jobs throughout the country, the expert will typically select “National Wage Data.” For a welder-fitter who traveled throughout their respective state to work, the expert will select “Wage Data by State.” For this example, the welder-fitter primarily worked in the Dallas, TX area, so the next step is to select “Wage Data by Metropolitan Area.” From there, locate the proper Metropolitan Statistics Area (MSA), which in this case is “Dallas-Fort Worth-Arlington, TX,” and select it, which will bring up the following page:

Occupational Employment and Wage Statistics

Search Occupational Em

OEWS Home

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May 2022 Metropolitan and Nonmetropolitan Area Occupational Employment and Wage Estimates

Dallas-Fort Worth-Arlington, TX

For metropolitan and nonmetropolitan area definitions used by the OEWS survey, see the [metropolitan and nonmetropolitan area definitions](#) page.

These estimates are calculated with data collected from employers in all industry sectors in Dallas-Fort Worth-Arlington, TX, a metropolitan statistical area in Texas.

Additional information, including the hourly and annual 10th, 25th, 75th, and 90th percentile wages and the employment percent relative standard error, is available in the [downloadable XLS file](#).

[Links to OEWS estimates for other areas and states](#)

Major Occupational Groups in Dallas-Fort Worth-Arlington, TX (**Note**--clicking a link will scroll the page to the occupational group):

- [00-0000 All Occupations](#)
- [11-0000 Management Occupations](#)
- [13-0000 Business and Financial Operations Occupations](#)
- [15-0000 Computer and Mathematical Occupations](#)
- [17-0000 Architecture and Engineering Occupations](#)
- [19-0000 Life, Physical, and Social Science Occupations](#)
- [21-0000 Community and Social Service Occupations](#)
- [23-0000 Legal Occupations](#)
- [25-0000 Educational Instruction and Library Occupations](#)
- [27-0000 Arts, Design, Entertainment, Sports, and Media Occupations](#)
- [29-0000 Healthcare Practitioners and Technical Occupations](#)
- [31-0000 Healthcare Support Occupations](#)
- [33-0000 Protective Service Occupations](#)
- [35-0000 Food Preparation and Serving Related Occupations](#)
- [37-0000 Building and Grounds Cleaning and Maintenance Occupations](#)
- [39-0000 Personal Care and Service Occupations](#)
- [41-0000 Sales and Related Occupations](#)
- [43-0000 Office and Administrative Support Occupations](#)
- [45-0000 Farming, Fishing, and Forestry Occupations](#)
- [47-0000 Construction and Extraction Occupations](#)
- [49-0000 Installation, Maintenance, and Repair Occupations](#)
- [51-0000 Production Occupations](#)
- [53-0000 Transportation and Material Moving Occupations](#)

To sort this table by a different column, click on the column header

Specific jobs are broken up into Major Occupational Groups, which are represented by the first two digits of the SOC code. Here, we will select the Major Occupational Group associated with 51-0000 which is listed as “Production Occupations.” Next, locate the proper job based on the full SOC code of 51-4121 and the job title “welders, cutters, solderers, and brazers.”

Occupation code	Occupation title (click on the occupation title to view its profile)	Level	Employment	Employment RSE	Employment per 1,000 jobs	Location quotient	Median hourly wage	Mean hourly wage	Annual mean wage	Mean wage RSE
51-4021	Setters, Operators, and Tenders, Metal and Plastic	detail	1,260	19.0%	0.331	0.77	\$17.80	\$19.10	\$39,730	1.9%
51-4022	Forging Machine Setters, Operators, and Tenders, Metal and Plastic	detail	130	19.9%	0.035	0.48	\$18.67	\$19.85	\$41,290	2.4%
51-4023	Rolling Machine Setters, Operators, and Tenders, Metal and Plastic	detail	470	31.4%	0.125	0.66	\$17.34	\$20.43	\$42,500	7.1%
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	detail	4,000	5.8%	1.052	0.85	\$18.07	\$19.21	\$39,950	0.8%
51-4032	Drilling and Boring Machine Tool Setters, Operators, and Tenders, Metal and Plastic	detail	110	31.7%	0.029	0.67	\$17.80	\$18.47	\$38,420	12.0%
51-4033	Grinding, Lapping, Polishing, and Buffing Machine Tool Setters, Operators, and Tenders, Metal and Plastic	detail	800	8.0%	0.211	0.42	\$17.98	\$19.12	\$39,760	2.8%
51-4034	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	detail	220	13.9%	0.059	0.45	\$20.31	\$20.85	\$43,360	3.7%
51-4035	Milling and Planing Machine Setters, Operators, and Tenders, Metal and Plastic	detail	150	14.9%	0.038	0.37	\$19.48	\$25.33	\$52,680	7.1%
51-4041	Machinists	detail	4,360	6.3%	1.145	0.53	\$24.00	\$26.34	\$54,780	2.3%
51-4051	Metal-Refining Furnace Operators and Tenders	detail	120	21.3%	0.032	0.25	\$18.40	\$21.16	\$44,020	1.4%
51-4052	Pourers and Casters, Metal	detail	40	7.9%	0.010	0.25	\$23.78	\$25.63	\$53,320	2.6%
51-4061	Model Makers, Metal and Plastic	detail	40	20.8%	0.010	0.42	\$36.84	\$33.19	\$69,030	9.8%
51-4071	Foundry Mold and Coremakers	detail	110	20.2%	0.030	0.39	\$15.26	\$17.65	\$36,720	6.3%
51-4072	Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	detail	2,420	12.6%	0.636	0.57	\$15.47	\$17.06	\$35,480	2.9%
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	detail	2,280	10.1%	0.600	0.65	\$17.60	\$18.59	\$38,670	2.4%
51-4111	Tool and Die Makers	detail	470	6.4%	0.125	0.30	\$28.86	\$30.11	\$62,620	1.8%
51-4121	Welders, Cutters, Solderers, and Brazers	detail	9,910	3.1%	2.605	0.94	\$22.70	\$24.42	\$50,800	1.1%

Once the proper SOC code and job title is located, the expert can find the median wages for a welder-fitter in the Dallas, TX metropolitan area. If the expert wants more detailed wage information, they can select the job to bring up the following page:

OEWS Home	OEWS Publications ▾	OEWS Data ▾	OEWS Methods ▾	About OEWS ▾	Contact OEWS
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Occupational Employment and Wages, May 2022

51-4121 Welders, Cutters, Solderers, and Brazers

Use hand-welding, flame-cutting, hand-soldering, or brazing equipment to weld or join metal components or to fill holes, indentations, or seams of fabricated metal products.

[National estimates for Welders, Cutters, Solderers, and Brazers](#)

[Industry profile for Welders, Cutters, Solderers, and Brazers](#)

[Geographic profile for Welders, Cutters, Solderers, and Brazers](#)

National estimates for Welders, Cutters, Solderers, and Brazers:

Employment estimate and mean wage estimates for Welders, Cutters, Solderers, and Brazers:

Employment (1)	Employment RSE (3)	Mean hourly wage	Mean annual wage (2)	Wage RSE (3)
408,990	1.2 %	\$ 24.26	\$ 50,460	0.2 %

Percentile wage estimates for Welders, Cutters, Solderers, and Brazers:

Percentile	10%	25%	50% (Median)	75%	90%
Hourly Wage	\$ 17.01	\$ 18.98	\$ 22.86	\$ 27.93	\$ 33.05
Annual Wage (2)	\$ 35,380	\$ 39,480	\$ 47,540	\$ 58,100	\$ 68,750

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