

## Non-Tax Filers

Nontax filers and tax filers who received an extension but still have not filed their 2020 taxes must provide confirmation of non-filing dated on or after October 1, 2021. A confirmation of non-filing can be obtained from the IRS using Form 4506-T and checking box 7. If appropriate, a similar confirmation from another taxing authority (e.g. a U.S. territory or a foreign government) is also acceptable. If you (or your spouse/parent) are self-employed and did not file taxes, please provide a signed statement certifying the amount of adjusted gross income (AGI) and U.S. income tax paid.

## Tax Filing Extension

An individual who is required to file a 2020 IRS Income Tax Return and has been granted a filing extension by the IRS, must provide:

- ✓ A copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," that was file with the IRS for tax year 2020
- ✓ A copy of the IRS's approval of an extension beyond the automatic six-month extension if the individual requested an additional extension of the filing tax time for tax year 2020
- ✓ Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS or other relevant tax authority dated on or after October 1, 2021
- ✓ A copy of IRS Form W-2 for each source of employment income received for tax year 2020
- ✓ If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2020

## Amended Taxes

An individual who filed an amended IRS income tax return for tax year 2020 must provide:

- ✓ A copy of your **original** 2020 Form 1040 and Schedules 1-6
- ✓ A signed copy of the 2020 IRS Form 1040X, "Amended U.S. Individual Tax Return," that was filed with the IRS

## Victims of Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- ✓ A Tax Return Data Base View (TRDBV) transcript obtained from the IRS, or any other IRS tax transcript(s) that include all of the income and tax information required to be verified
- ✓ A statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft and that the IRS is aware of the tax-related identity theft