
2) Middle of screen under “Tools” choose “Get Transcript of your Tax Records”

3) That will take you to a screen where you will have two options; 1. Get Transcript online (follow steps 6 through 9) or 2. Get transcript by Mail (follow steps 4 and 5). If you choose to get it by mail it will take 10-14 days for them to process and send one out to you. If you choose to get it online you can print it out and send it in to us.

4) If you choose to “Get Transcript in the Mail” then that will take you to a screen where you will need to input your SSN, date of birth, street address (you must put it exactly like what was on your actual 1040), and your zip code.

5) You will then need to select the type of transcript (you want a Tax Return Transcript for the year requested)

6) If you choose to “Get Transcript Online” then that will take you to a log-in screen. You can also create an account on that screen.

7) You will have to enter all of the information to set-up a profile for them. This usually takes 10-20 minutes.

8) Once you have completed the profile, you will need to choose what information you are trying to view (in this case you will want the Tax Return Transcript from the year requested).

9) Print it and send it in to us either by mail (Financial Planning Office, PO Box 955, Boiling Springs NC, 28017), scan it and email it ([Financialplanning@gardner-webb.edu](mailto:Financialplanning@gardner-webb.edu)), or fax it to us ((704) 406-4102).

Done!