IRS Privacy Release Instructions and General Information

*The IRS privacy release **must** be completed by the guidelines below before a case can be submitted. If any of the following information is missing, we will have to return the release for clarification. *

Our privacy release **MUST** include the following:

- Your contact information (current address, email, and phone number)
- Social Security number(s)
- Tax Year(s)
- Tax Form (1040 or 1040x)
- Brief explanation of the issue, including the date and method of filing
- For all inquiries, add an attached signed copy of the first two pages of your tax return (1040 or 1040x)
- If a business inquiry, list the Employer Identification Number (EIN)

A **joint return** must have both names and social security numbers listed on the release.

Important General Information

- Our office facilitates casework through the Tax Payer Advocates (TPA) Office in Little Rock.
- It will take 7 to 14 days for an advocate to get assigned to your case and respond to our office.
- If you have any documentation that you received from the IRS about your return, please send a copy to our office with your privacy form.
- If your case is an identity verification case, please send a clear copy of your driver's license or state ID and a copy of your social security card with your privacy form.
- If you are working directly with our office, the TPA will only speak to us about your case.
- The TPA will only discuss the year(s) you list on the privacy form.
- You can check your refund status on the IRS website at IRS.GOV.