

How to Get Your IRS Tax Transcript for Immigration

For the Form I-864 Affidavit of Support · USCIS and National Visa Center (NVC) cases · By Joseph Botelho, Immigration Attorney

A TAX RETURN is what you filed. A TAX TRANSCRIPT is what the IRS has in its records. They are not the same document.

For most Affidavit of Support cases, send the **Tax Return Transcript** for the **most recent tax year**. The Department of State says NVC can process a transcript more efficiently than a copy of a return.

Transcripts are always free. Never pay a website for one.

WHICH TRANSCRIPT DO I NEED?

Transcript	What it shows	Years
Tax Return Transcript ★ usually the one	Your original Form 1040 as filed, with schedules	Current + 3 prior
Tax Account Transcript	Filing status, payments, later changes	Current + 9 prior online
Record of Account	Return and account combined; use if amended	Current + 3 prior
Wage and Income Transcript	W-2s, 1099s reported to the IRS; lost W-2s, joint filers	Current + 9 prior
Verification of Non-Filing Letter	No return on record for that year; use if you did not file	Current year after June 15

HOW MANY YEARS?

- **Required:** the most recent tax year.
- **Optional:** the 2nd and 3rd most recent years, if they help show your income.
- **Our advice:** pull all 3. They are free, and the I-864 asks for 3 years of income figures anyway.

4 FREE WAYS TO GET IT

Method	Types	Time	Watch out for
1. IRS Online Account IRS.gov → Sign in → Tax Records → Transcripts	All 5	Instant PDF	Identity check (currently ID.me)
2. Get Transcript by Mail IRS.gov	Return + Account	5–10 calendar days	Enter the EXACT address from your last return
3. Automated phone line 800-908-9946	Return + Account	5–10 calendar days	Mailed to the address the IRS has on file
4. Form 4506-T Mail or fax per the form	All 5, incl. Non-Filing	~10 business days + mail	Must reach the IRS within 120 days of signing

Form 4506-T-EZ requests only the Tax Return Transcript. It **cannot** get a Verification of Non-Filing Letter.

IF THE IRS WEBSITE WILL NOT VERIFY YOU

Common after a move, a name change, or when your phone is not in your own name. Do not pay anyone. Use Method 2, 3, or 4, or verify in person at an IRS Taxpayer Assistance Center by appointment.

IF YOU MOVED SINCE YOUR LAST RETURN

Mailed transcripts go to the address the IRS has on file and are **not forwarded**. File **Form 8822, Change of Address**, first (generally 4–6 weeks), then request by mail or Form 4506-T. Or use Method 1 online.

SPECIAL SITUATIONS

- **Filed JOINTLY:** the transcript shows combined income. Also send your W-2s or schedules for that year.
- **Filed SEPARATELY:** only your income shows. Check that it meets the required level.
- **JOINT SPONSOR:** they pull their own transcript from their own IRS account. Never share passwords.

- **Did NOT FILE:** a signed statement explaining why you were **not required** to file, plus a Verification of Non-Filing Letter (Form 4506-T). If you WERE required to file, talk to an attorney first.
- **Filed an EXTENSION:** a copy of Form 4868 or a signed statement, plus last year's transcript or return.
- **NAME CHANGED:** expect online verification trouble and be ready to explain the difference.
- **"No record of return filed"** on the current-year Wage and Income Transcript: it may not have posted yet. Check again in early February.
- **Spanish:** transcripts are available in Spanish through the IRS Online Account.

BEFORE YOU SEND IT: CHECKLIST

- ☐ It says TAX RETURN TRANSCRIPT at the top, for the correct year
- ☐ ALL pages included, not just page 1
- ☐ Exactly as the IRS produced it: nothing blacked out, nothing retyped
- ☐ W-2s or schedules included if you filed jointly
- ☐ Correct figure copied to the I-864 (total income, AGI, and taxable income are different lines)
- ☐ Current edition of Form I-864 (08/24/26 edition required from October 1, 2026)
- ☐ Saved as a PDF, opened, and checked that it is readable

FILE NAMING

LASTNAME_FIRSTNAME_TaxReturnTranscript_YEAR.pdf · Example: SILVA_MARIA_TaxReturnTranscript_2025.pdf

TALK TO AN ATTORNEY BEFORE YOU SEND ANYTHING IF...

- You were required to file and did not
- The income shown is below the requirement for your household size
- The transcript shows income or activity you do not recognize
- You owe the IRS or are on a payment plan, especially with naturalization ahead
- Your name or filing status does not match your immigration paperwork

Protect your case from notario fraud. In the United States, a notary public is not a lawyer and cannot give legal advice. Only a licensed attorney or a DOJ-accredited representative may give you immigration legal advice.

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