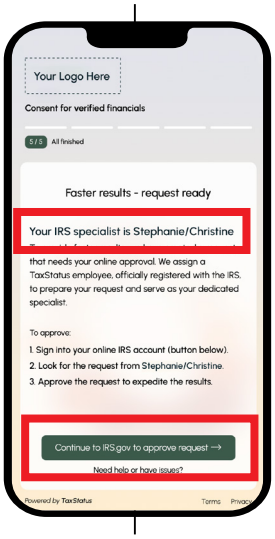
TaxStatus

Skip the IRS Queue

Expedite your records to your advisor same day by logging into the IRS website

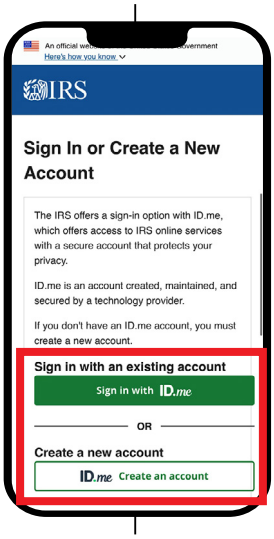
If you already have an IRS.gov account you can log in and release your tax information same day, bypassing the IRS review process altogether. Your advisor will send you a unique link which will take you into the IRS website in order to release your information. Follow the steps below to get started.

STEP 1



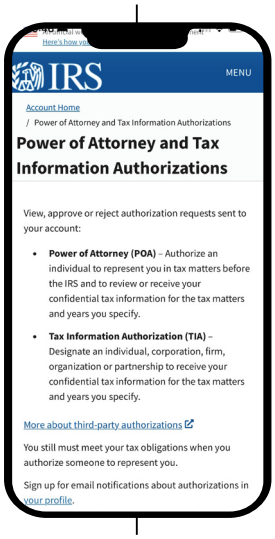
Opening your advisor link shows you your assigned TaxStatus employee (Stephanie or Christine). Click Continue.

STEP 2



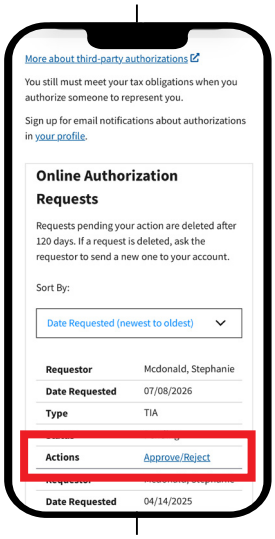
Sign in with ID.me if you already have an account, or click below to create an account

STEP 3



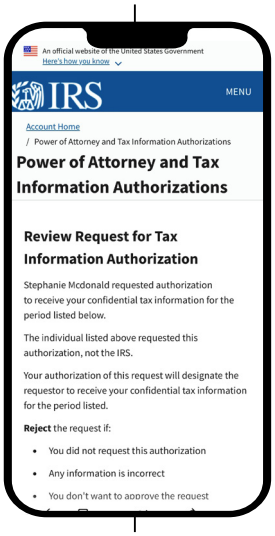
Scroll down to the bottom of the authorization page to find "Actions"

STEP 4



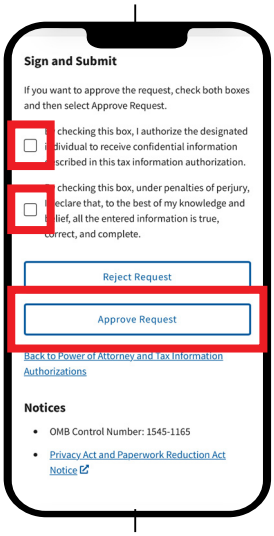
Click Approve/Reject to approve the request from the TaxStatus Representative

STEP 5



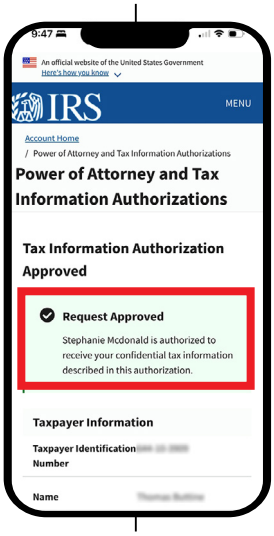
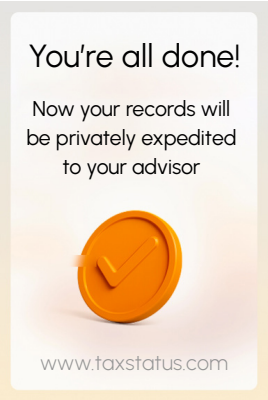
Scroll down to review the request

STEP 6



Check both boxes and click: Approve Request

STEP 7



You will see a message stating that your request has been approved