TaxStatus®

Client Consent

You are in control of your data. TaxStatus can only access and provide records to your advisor with your consent and IRS approval.

Your advisor will send you a link to grant permission to request your IRS records. The consent process can be completed in less than 60 seconds - that's all that is required from you!

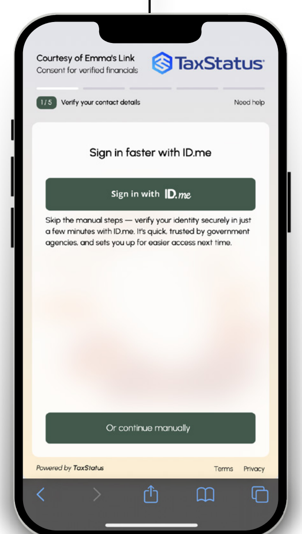
TaxStatus supports multiple forms of identity verification to ensure a completely secure workflow, including ID.me (preferred) and ID Capture / Selfie Check. Once approved by the IRS, your digital records are securely delivered to your advisor's TaxStatus account within a matter of days.

If you would like your advisor to receive your Verified Financials more quickly, you can authorize your data to be available within minutes. To do so, click the provided link, login to your IRS.gov account, and you will be directed to the right place to authorize the release of information directly on the IRS website. All requests will be listed under the name of a TaxStatus employee who is officially registered with the IRS for security and compliance purposes.

SECTION 1

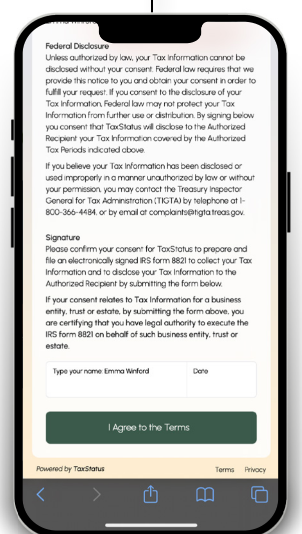
Welcome

SECTION 2



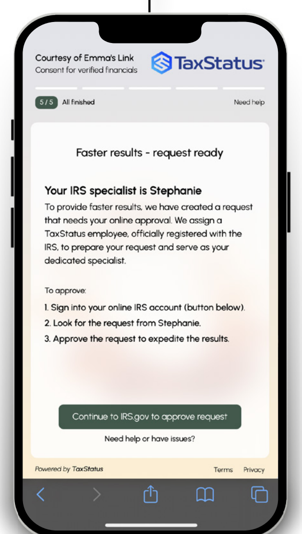
Identity Verification with ID.Me (or optional Persona)

SECTION 3



Agree to Terms

SECTION 4



Fast Track