

Why TaxStatus

Providing your financial partners with complete, accurate verified financial data allows them to deliver the best possible advice for your situation. Instead of manually collecting and sending paper tax returns each year, TaxStatus does the work for you — securely and in just a few clicks.

What TaxStatus Provides

At TaxStatus, we're here to show you what the IRS sees. We streamline contact with the IRS, enabling taxpayers to access and share their official records at the touch of a button. We also provide IRS account monitoring, giving your advisor early warnings of potential IRS notices — for example, if you owe taxes or are flagged for an audit. The result is financial empowerment, better decision-making, and complete transparency.

Most importantly, we pledge to be the ultimate taxpayer advocate. To learn more about our Taxpayer Promise, visit www.taxstatus.com/promise.

Your Consent

By providing your consent, TaxStatus will securely request your tax information from the IRS and disclose it only with your authorized advisor, professional, or institution for the time period specified in the official authorization language. Typically, your consent remains active for three years from the date of authorization, but you can revoke it at any time by emailing us at privacy@taxstatus.com.

Security is Our #1 Priority

Security isn't an add-on — it's built into everything we do. The data belongs to you, and the IRS states that every taxpayer has the right to view and share their own information.

- End-to-end AES-256 encryption
- SOC 2 Type II compliance
- Enterprise-grade security and monitoring

We ensure your data remains between you and your trusted financial partners — and no one else.



How It Works

You own your data. TaxStatus can only access and share your records with your advisor upon your consent and IRS approval.

Your advisor will send you a link to grant consent. The consent process can take less than 60 seconds and can be completed in one of three ways:

1. Sign-in to ID.me and E-sign (fastest method), or
2. Upload a government ID, take a selfie to verify your identity, and E-sign, or
3. Wet sign a form (request from your advisor)

Once verified, your digital records are securely delivered to your advisor's TaxStatus account.

Your advisor may pre-fill basic information to simplify your setup.