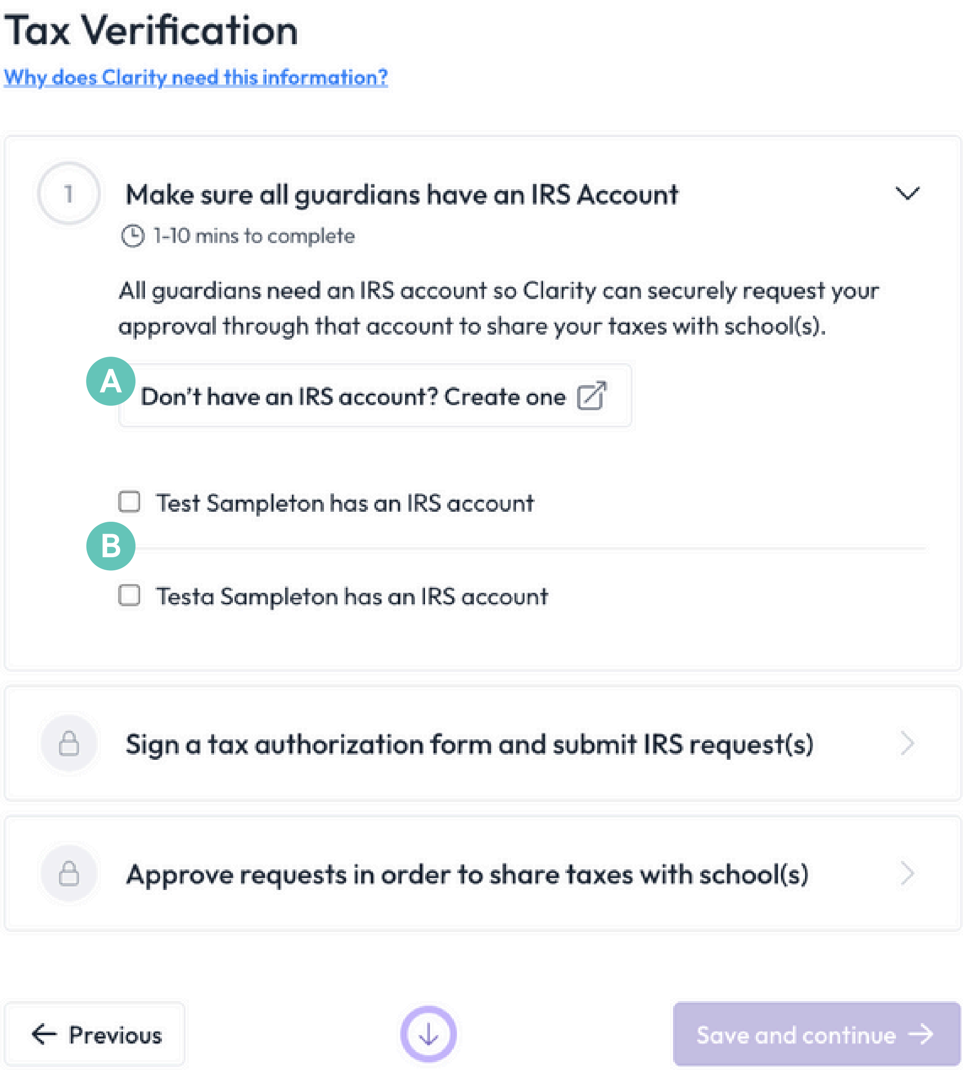
Tax Verification Guide

This guide will walk you step-by-step through the tax verification process for the financial aid application.

Tax Verification

STEP 1 - CREATE/CONFIRM IRS ACCOUNT

- Each guardian will need to create their own individual IRS account.
- If you already have an account, simply check the box to confirm and skip to page 9 of this guide.



A If any guardians in the household do not have an IRS account, click this button to create one.
(See pages 3-8 for step-by-step instructions on the creation process)

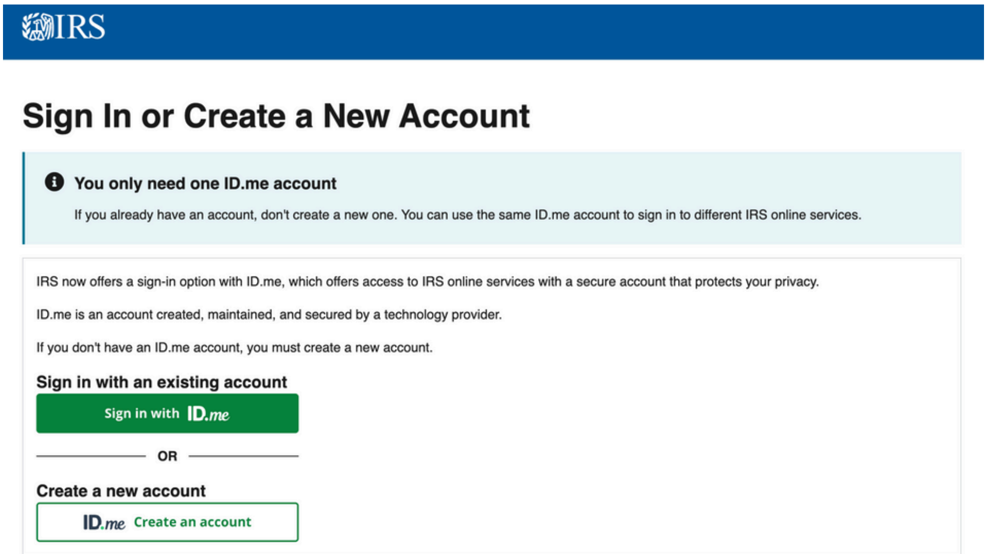
B Once created, or if you already have an IRS account, check the box to confirm and skip to page 9 of this guide.

Tax Verification

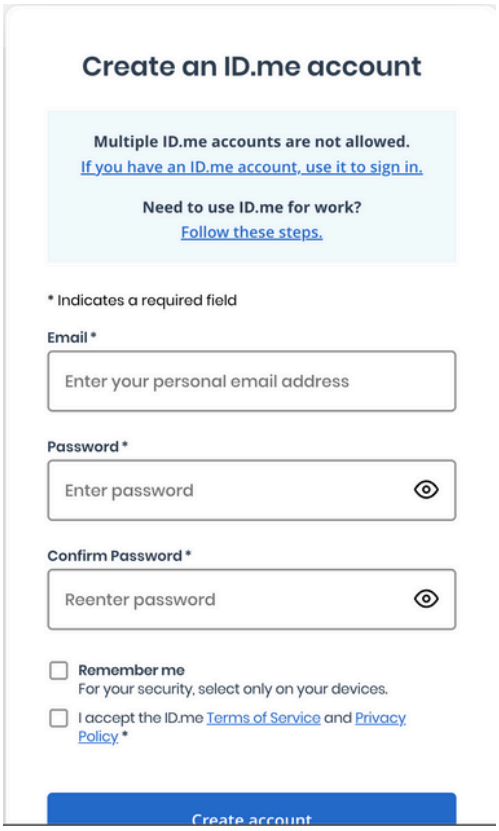
STEP 2 - IRS ACCOUNT CREATION

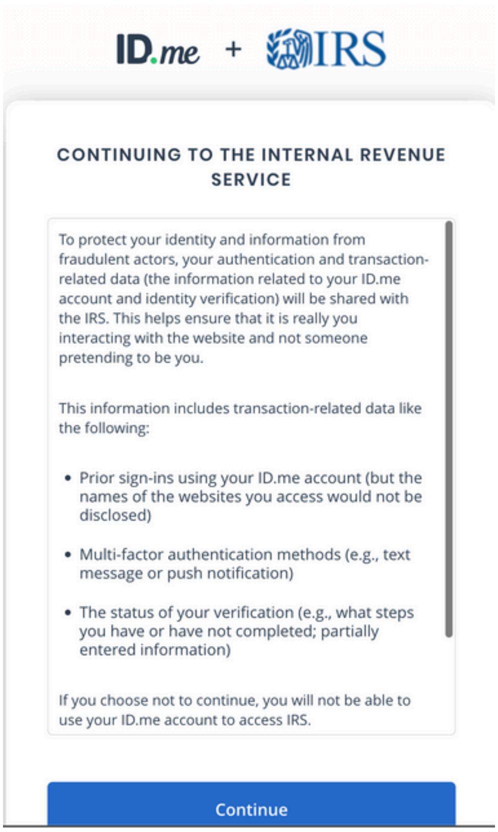
- If you already have an IRS account through ID.me, you do not need to complete these steps. Skip ahead to page 9 for the next steps in the Clarity process.
- These steps are completed outside of Clarity's scope. If you have any questions or encounter issues verifying your account, visit: [ID.me Support]

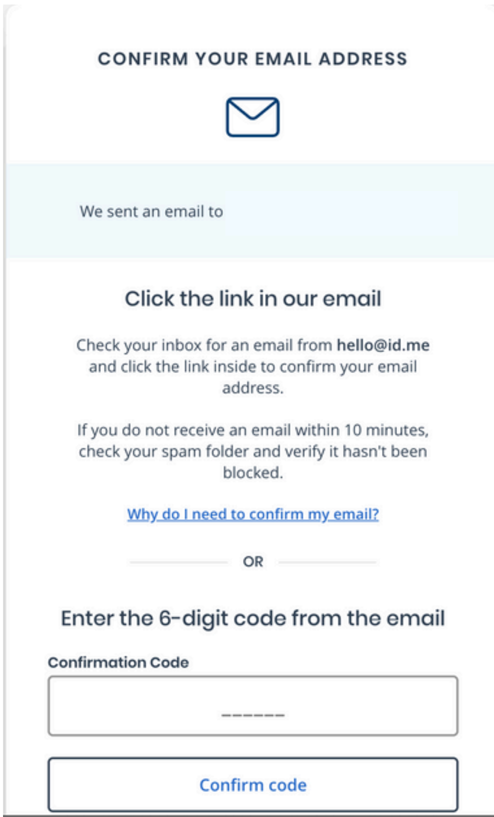
Click the Create an Account button to get started



Fill out your log-in information and follow the prompts to confirm your email.



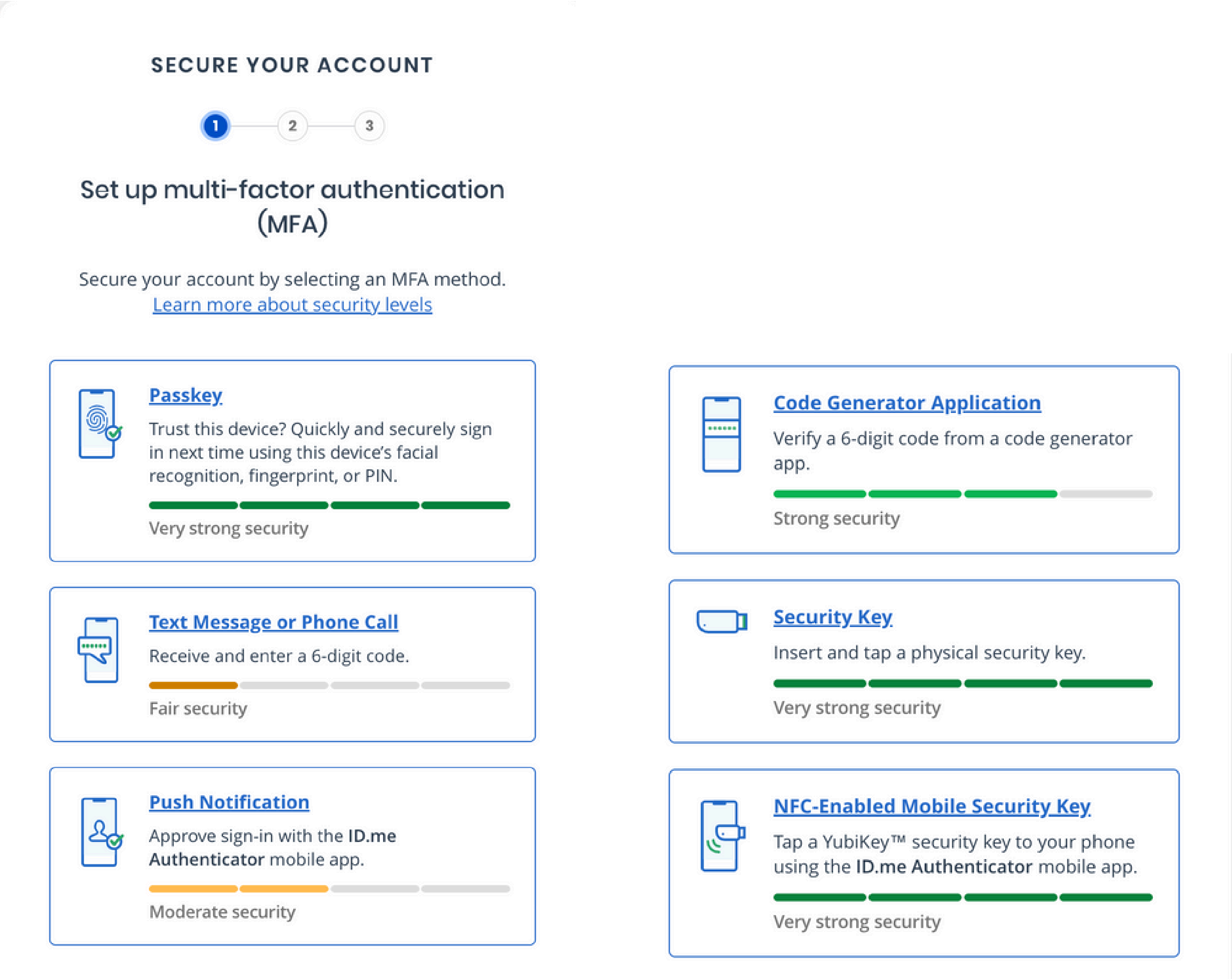




Tax Verification

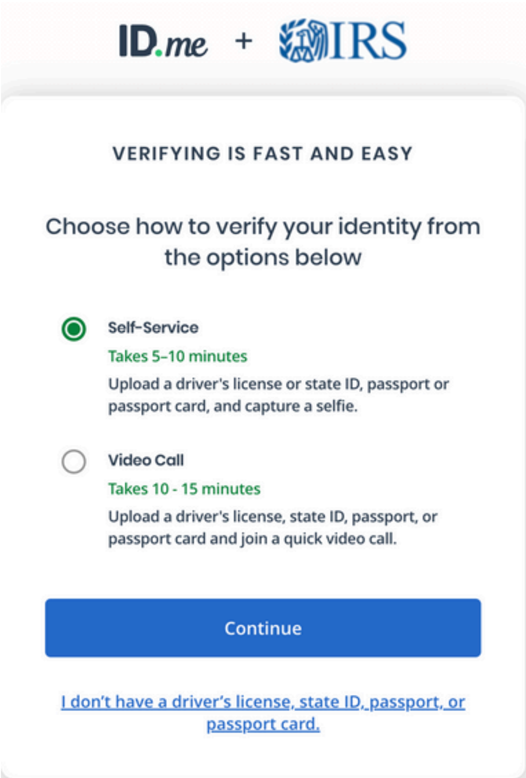
STEP 2 - IRS ACCOUNT CREATION (CONT'D)

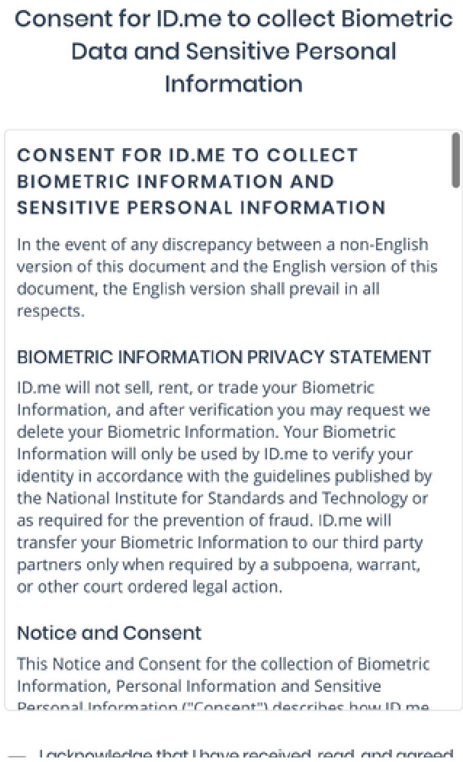
Once account has been created, you will need to set up multi-factor authentication. You can select whichever option works best for you.



STEP 3 - IRS ACCOUNT VERIFICATION

You will have the option to use Self-Service or a Video Call to verify your identity. If you select the Self-Service option, you will need to consent for ID.me to collect biometric data and sensitive personal information.





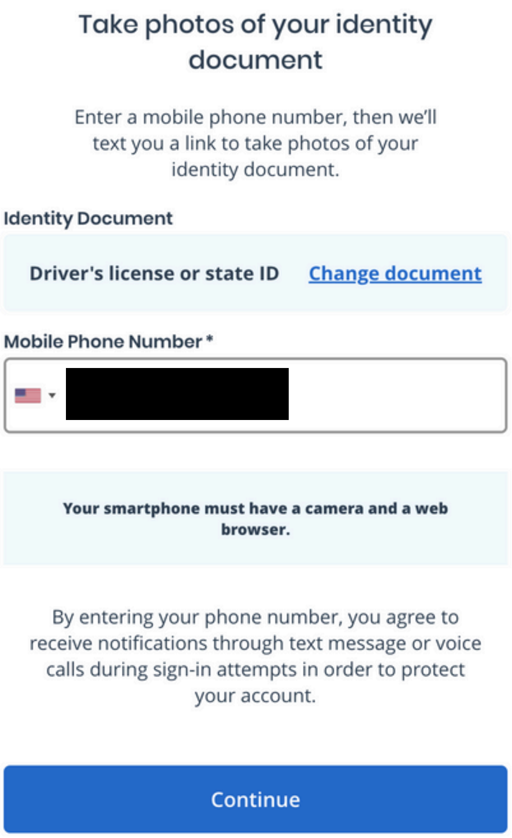
What information is being requested? Here is the explanation from the ID.me site:
note: for our purposes, it is very unlikely that fingerprint information will be requested

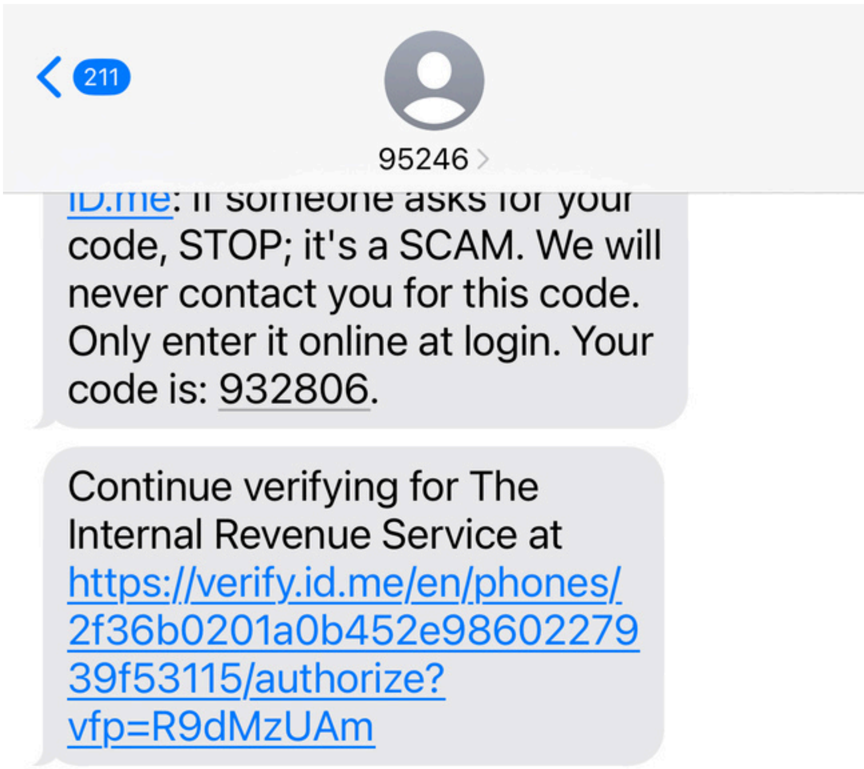
- Facial Biometrics: Our Service may require you to upload an image of your government issued or other identification document(s) as well as your photographic image or "selfie" photograph using your mobile or other device. We use these images to create or derive facial geometry or faceprint which we use for purposes of identity verification and to prevent the creation of multiple accounts in a fraudulent manner.
- Fingerprint Information: Our Service may require the submission of fingerprints, including fingerprint or hand scanning, which we use for purposes of identity verification and to prevent the creation of multiple accounts in a fraudulent manner.

STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Regardless of which verification method you choose, you will need to take photos of your identification document from your mobile device.

Enter your mobile phone number and then follow the link in the text message you receive.





Tax Verification

Clarity

STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to take photos of your identification.

1

ID.me + IRS

YOU ARE VERIFYING FOR
THE INTERNAL REVENUE SERVICE

⚠ **Be aware that fraudsters may:**

- **Create** fake postings including offers that seem too good to be true, such as fake jobs or apartments
- **Message** you on social media directing you to send personal information to them
- **Provide** instructions to complete actions for them

If you believe this is happening to you, STOP NOW and report fraud.

Is this your email address?

askow@claritytuition.com

Yes

No

2

ID.me + IRS

PREPARE YOUR DOCUMENT

Your document should be placed on a **well-lit surface** with a dark background.

Ensure that all 4 corners are visible.

Your document should be:

- ✅ Valid and unexpired
- ✅ Clear and readable

Start document upload

3

ID.me + IRS

TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5

Take photo of your driver's license or state ID (FRONT)

Take photo of your driver's license or state ID (BACK)

Please check the following to make sure your document can be processed:

- The image is clear and not blurry (including your photo and/or barcode)
- All information is visible (e.g., expiration date)
- The document is not captured at an angle

Continue

English

What is ID.me? | Terms of Service | Privacy Policy

4

TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5

Take a different photo (front)

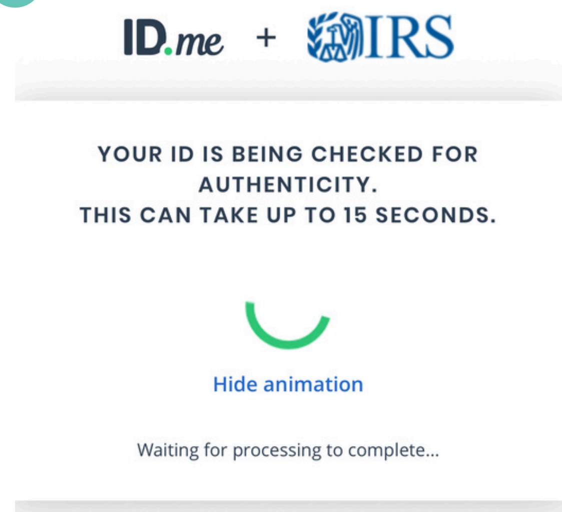
Take a different photo (back)

Submit your photos

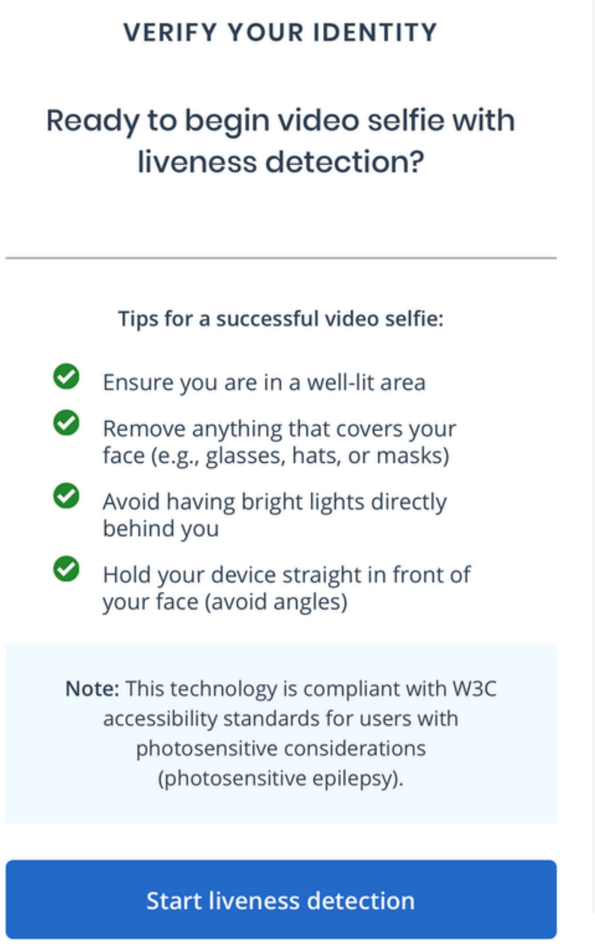
STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to upload a selfie. Once completed, you can return to the Clarity application.

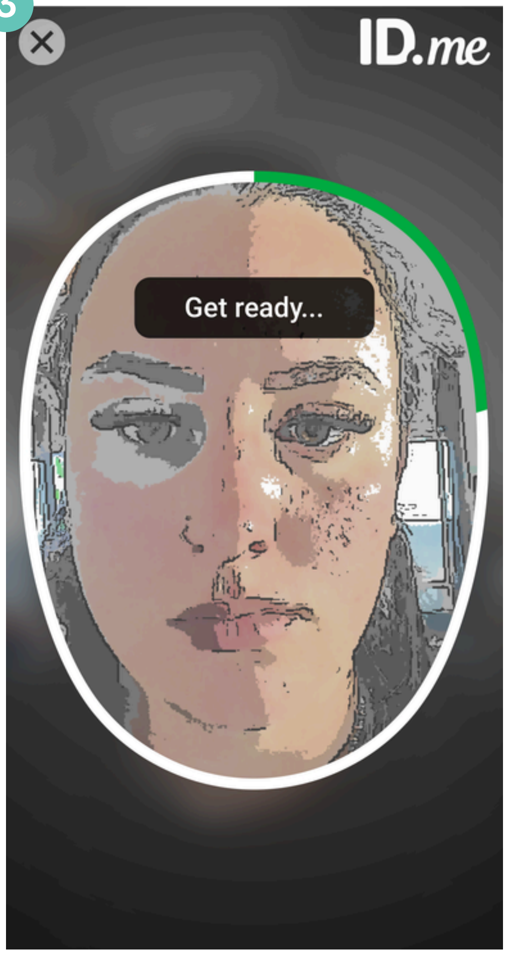
1



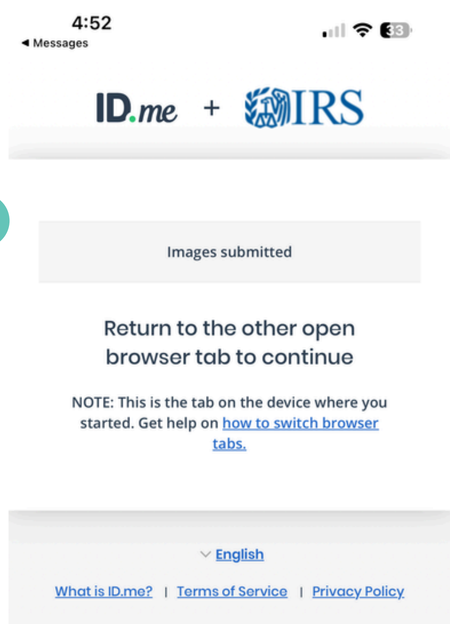
2



3

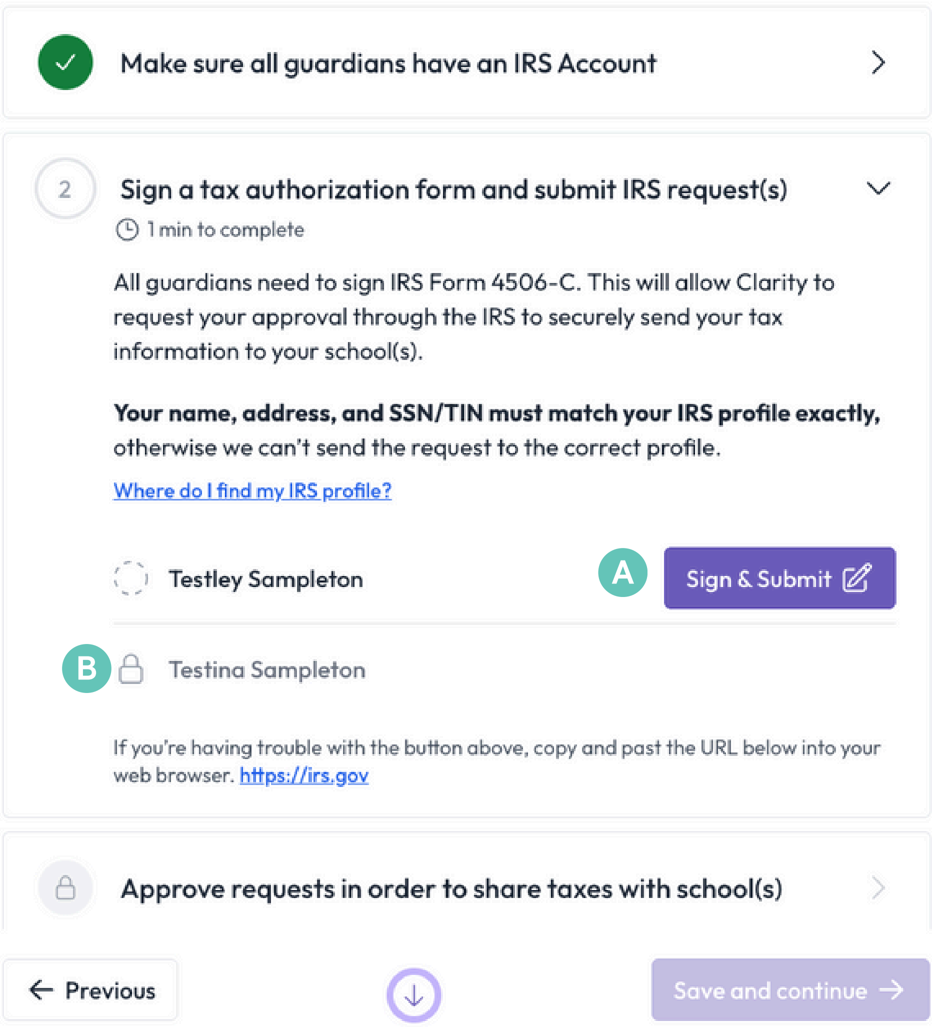


4



STEP 4 - TAX VERIFICATION FORM

- Once all guardians have checked the box confirming that the have an IRS account, Step 2 will automatically open up for you to begin signing the form.
- Each guardian will complete a separate copy of the tax verification form, with forms submitted one at a time.

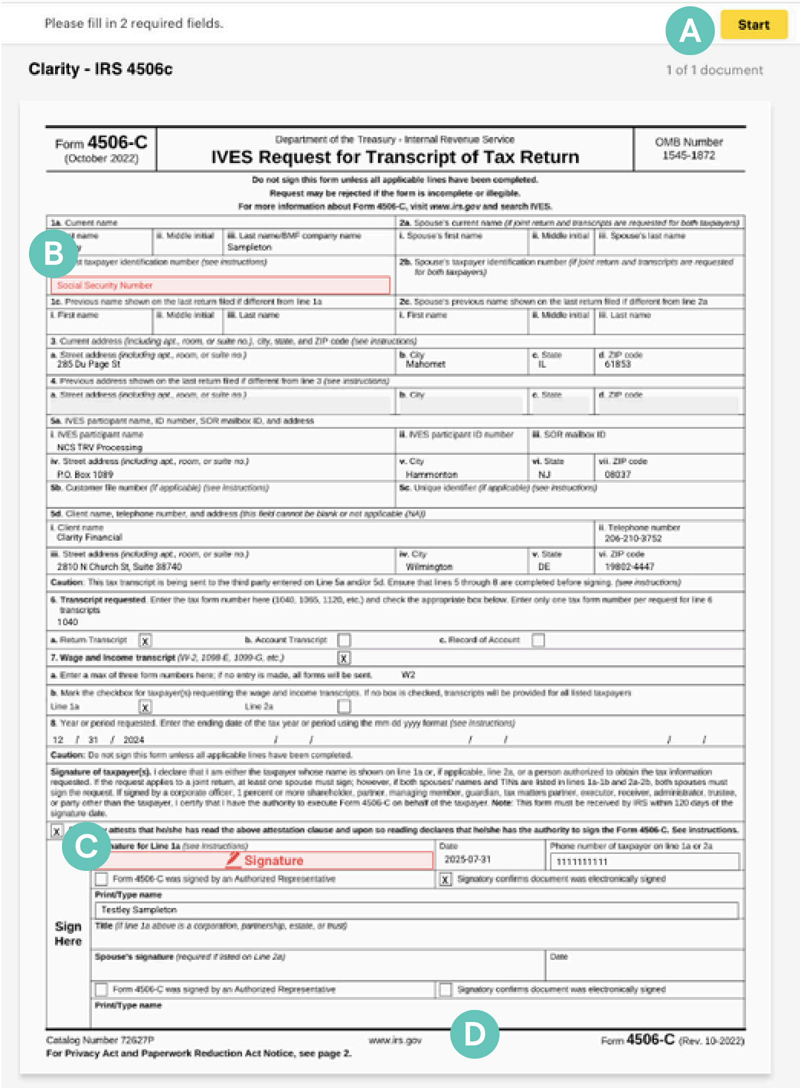


A The first, or only, guardian will click the Sign & Submit button to fill out the 4506-C tax verification form.

B If there is a second guardian, the Sign & Submit button will appear after the first guardian has signed the form. Repeat the same signing process for the second guardian

STEP 4 - TAX VERIFICATION FORM (CONT'D)

- Clarity will automatically fill in most of the information on the form using the details you provided in your application.
- Double-check that the pre-filled information is correct. If any details are incorrect, return to the application and update them.



Please fill in 2 required fields. A Start

Clarity - IRS 4506c

1 of 1 document

Form **4506-C** (October 2022) | Department of the Treasury - Internal Revenue Service | **IVES Request for Transcript of Tax Return** | OMB Number 1545-1872

Do not sign this form unless all applicable lines have been completed.
Request may be rejected if the form is incomplete or illegible.
For more information about Form 4506-C, visit www.irs.gov and search IVES.

1a. Current name — i. First name; ii. Middle initial; iii. Last name/BMF company name: Sampleton
B
1b. ... taxpayer identification number (see instructions): Social Security Number
2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers) — i. Spouse's first name; ii. Middle initial; iii. Spouse's last name
2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)
1c. Previous name shown on the last return filed if different from line 1a — i. First name; ii. Middle initial; iii. Last name
2c. Spouse's previous name shown on the last return filed if different from line 2a — i. First name; ii. Middle initial; iii. Last name
3 Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
a. Street address (including apt., room, or suite no.): 285 Du Page St — b. City: Mahomet — c. State: IL — d. ZIP code: 61853
4 Previous address shown on the last return filed if different from line 3 (see instructions)
a. Street address (including apt., room, or suite no.) — b. City — c. State — d. ZIP code
5a. IVES participant name, ID number, SOR mailbox ID, and address
i. IVES participant name: NCS TRV Processing — ii. IVES participant ID number — iii. SOR mailbox ID
iv. Street address (including apt., room, or suite no.): P.O. Box 1089 — v. City: Hammonton — vi. State: NJ — vii. ZIP code: 08037
5b. Customer file number (if applicable) (see instructions) — 5c. Unique identifier (if applicable) (see instructions)
5d. Client name, telephone number, and address (this field cannot be blank or not applicable (NA))
i. Client name: Clarity Financial — ii. Telephone number: 206-210-3752
iii. Street address (including apt., room, or suite no.): 2810 N Church St, Suite 38740 — iv. City: Wilmington — v. State: DE — vi. ZIP code: 19802-4447
Caution: This tax transcript is being sent to the third party entered on Line 5a and/or 5d. Ensure that lines 5 through 8 are completed before signing. (see instructions)
6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts: 1040
a. Return Transcript [x] — b. Account Transcript [ ] — c. Record of Account [ ]
7. **Wage and Income transcript** (W-2, 1098-E, 1099-G, etc.) [x]
a. Enter a max of three form numbers here; if no entry is made, all forms will be sent. W2
b. Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers — Line 1a [x] — Line 2a [ ]
8 Year or period requested. Enter the ending date of the tax year or period using the mm dd yyyy format (see instructions): 12 / 31 / 2024
Caution: Do not sign this form unless all applicable lines have been completed.
Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or, if applicable, line 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign; however, if both spouses' names and TINs are listed in lines 1a-1b and 2a-2b, both spouses must sign the request. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer. **Note:** This form must be received by IRS within 120 days of the signature date.
[x] ... **attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.**
C
Sign Here
...**ature for Line 1a** (see instructions): Signature — Date: 2025-07-31 — Phone number of taxpayer on line 1a or 2a: 1111111111
[ ] Form 4506-C was signed by an Authorized Representative — [x] Signatory confirms document was electronically signed
Print/Type name: Testley Sampleton
Title (if line 1a above is a corporation, partnership, estate, or trust)
Spouse's signature (required if listed on Line 2a) — Date
[ ] Form 4506-C was signed by an Authorized Representative — [ ] Signatory confirms document was electronically signed
Print/Type name
D
Catalog Number 72627P — www.irs.gov — Form **4506-C** (Rev. 10-2022)
For Privacy Act and Paperwork Reduction Act Notice, see page 2.

A Depending on the size of your browser window, the yellow buttons saying "Start, fill, next, and finish" will either appear next to the box that needs to be filled out, or at the bottom of the page. You can either click the buttons or just navigate and click directly on the box that needs to be filled out.

B Enter the guardian's social security number.

C Enter the guardian's signature. It will be a digital e-signature

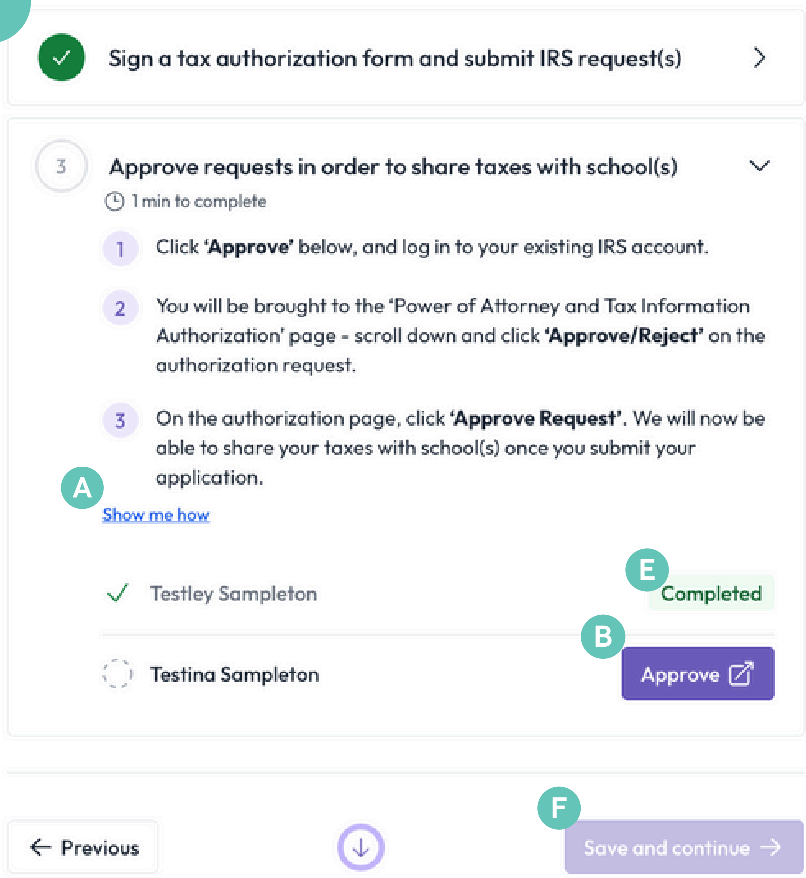
D A prompt to Finish will appear at the bottom of the screen to finalize the signing.

Tax Verification

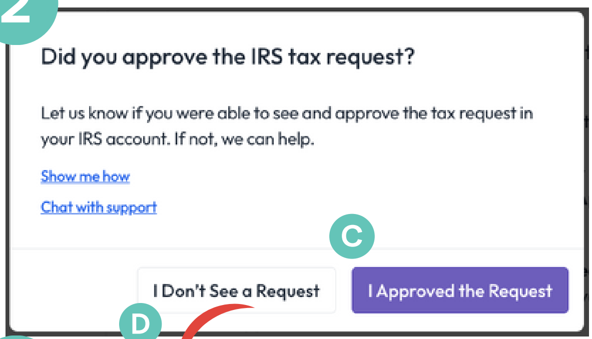
STEP 5 - APPROVE DOCUMENT REQUESTS

- As with the other pages, each guardian will complete the process separately, logging in to their personal IRS account.

1



2



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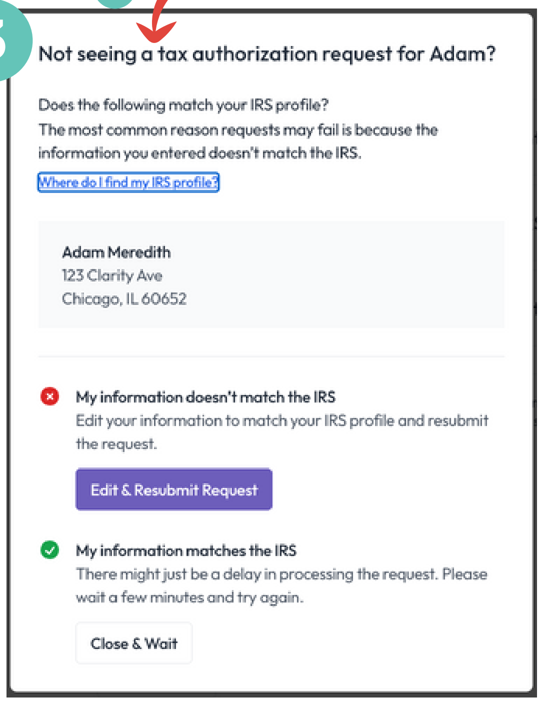


A The 'Show me how' link brings up a window providing the steps to take on the IRS website.

B Click Approve to be taken to the IRS website, which will open in a new tab/window. (See next page for the approval steps)

E After authorizing the request, it will show as 'Completed' for that guardian.

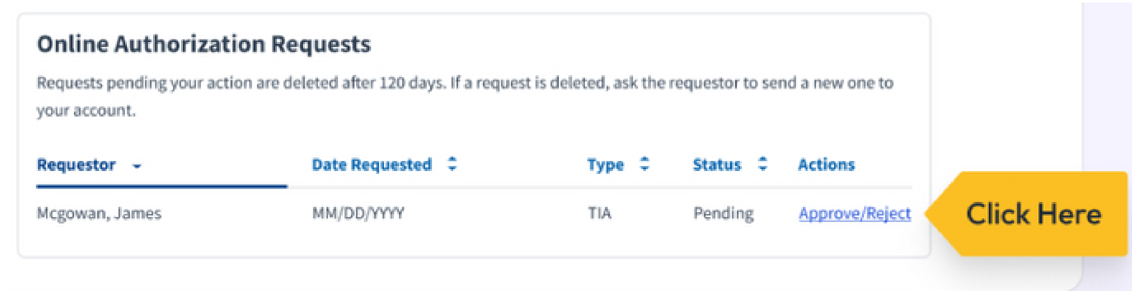
F Once all guardians have completed the request authorization, click Save and continue to move forward in the application.

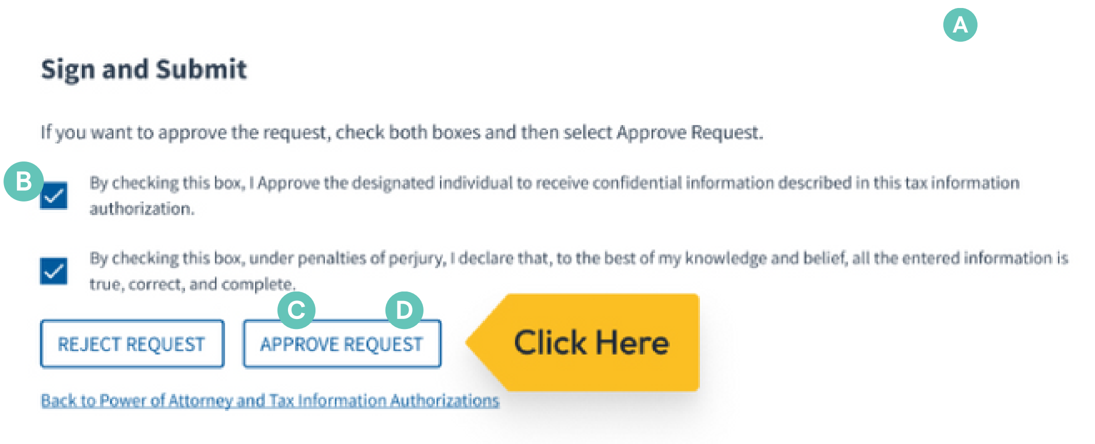
C Back on the Clarity page, click "I Approved the Request" if you were able to do so.

D If you are not seeing an authorization request, click on "I Don't See a Request" and follow the process shown in step 3

STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

- Once you sign in to your account, you will automatically be taken to the authorization request page





A Click "Approve/Reject" to move to the approval step.

B Check both boxes to agree to the authorization.

C Click Approve Request.

D Once request is approved, you can close the IRS page and continue your application (step 2 on page 11)