

# Tax Verification Guide

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

Questions? You can view/download the Tax Verification FAQs PDF on the [Tax Verification help page](#)

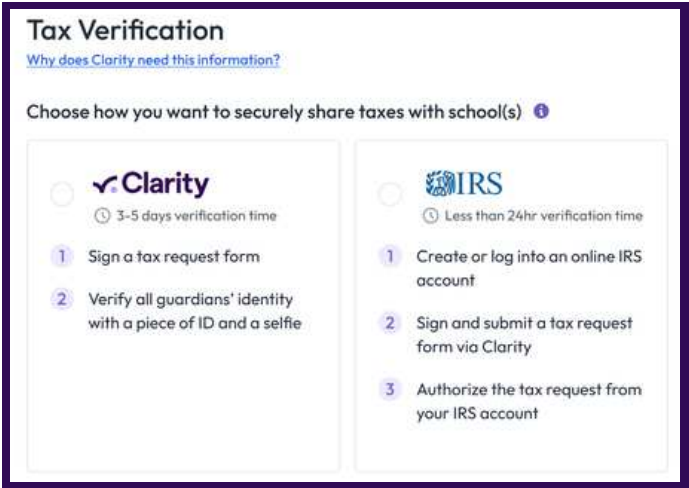
## Need more help?

We encourage you to keep this guide open as you complete these steps to help answer questions and provide explanation when needed. But if you get stuck, you can contact us at:

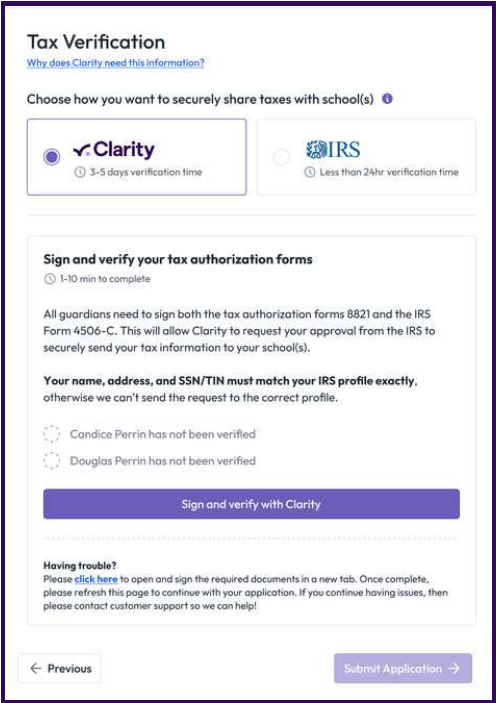
**[support@clarityapp.com](mailto:support@clarityapp.com)**

## STEP 1 - SELECT YOUR VERIFICATION PROCESS

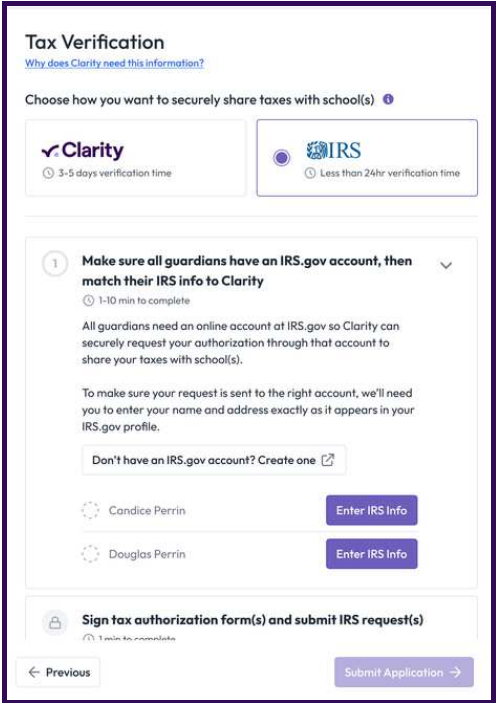
- You will have the option to verify through Clarity or through the IRS website.
- You can review the step-by-step directions for both processes in this guide.



Choose between verifying on Clarity  
or through the IRS



Continue to the next page (Page 03)  
for the step-by-step verification  
process through Clarity



Continue to Page 07 for the step-  
by-step verification process through  
the IRS

## Clarity Verification Process


### STEP 1 - SIGN THE FORMS


- During this process, you will sign both the 8821 and 4506c, which are tax authorization forms.


Start by clicking the “Sign and verify with Clarity button”. This will take you to the forms to e-sign both tax documents and tax authorization consent


### Tax Verification


[Why does Clarity need this information?](#)


Choose how you want to securely share taxes with school(s) 










 3-5 days verification time






 Less than 24hr verification time

#### Sign and verify your tax authorization forms


 1-10 min to complete

All guardians need to sign both the tax authorization forms 8821 and the IRS Form 4506-C. This will allow Clarity to request your approval from the IRS to securely send your tax information to your school(s).

**Your name, address, and SSN/TIN must match your IRS profile exactly,** otherwise we can't send the request to the correct profile.



Candice Perrin has not been verified





Douglas Perrin has not been verified

Sign and verify with Clarity

#### Having trouble?

Please [click here](#) to open and sign the required documents in a new tab. Once complete, please refresh this page to continue with your application. If you continue having issues, then please contact customer support so we can help!

 Previous

Submit Application 

03

# Tax Verification



## STEP 1 - SIGN THE FORMS (CONT'D)

- Both the 8821 and 4506c forms will be signed in the same digital document. You will start with the 8821, and then continue down to the 4506c after the Tax Authorization consent form is signed.
- You will sign the forms and complete verification for each guardian separately. Once verification is completed for the first guardian listed, the process will start for the second guardian

PandaDoc Clarity - IRS 8821 by Clarity Financial

Clarity - IRS 8821 1 of 1 document

**Form 8821**  
Rev. January 2021  
Department of the Treasury  
Internal Revenue Service

**Tax Information Authorization**  
▶ Go to [www.irs.gov/form8821](https://www.irs.gov/form8821) for instructions and the latest information.  
▶ Don't sign this form unless all applicable lines have been completed.  
▶ Don't use Form 8821 to request copies of your tax returns or to authorize someone to represent you. See instructions.

**1 Taxpayer information.** Taxpayer must sign and date this form on line 6.

Taxpayer name and address:  
Test Test  
1234 Main St  
New York, NY 10001

Taxpayer identification number(s):  
Social Security Number or Tax Identification Number: 123-45-6789  
Daytime telephone number: 777-888-9999  
Plan number (if applicable):

**2 Designated.** If you wish to name more than two designees, attach a list to this form. Check here if a list of additional designees is attached: ☐

Name and address:  
James McGowan  
25 Broad Street, Floor 2  
Red Bank, NJ 07701

CAF No.: 0315-238888  
PTIN: 90233881  
Telephone No.: 732-881-4828  
Fax No.: 631-675-1784

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

Name and address:  
Elizabeth Boonin  
65 Smithtown Blvd  
Smithtown, NY 11787

CAF No.: 0315-038708  
PTIN: 90122702  
Telephone No.: 732-881-4998  
Fax No.: 631-675-1784

Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

**3 Tax information.** Each designee is authorized to inspect and/or receive confidential tax information for the type of tax, forms, periods, and specific matters you list below. See the line 3 instructions.  
☐ By checking here, I authorize access to my IRS records via an Intermediate Service Provider.

Line	Type of Tax Information (Income, Employment, Payroll, Excise, Estate, Gift, Civil Penalty, Sec. 6800 Payments, etc.)	Tax Form Number (1040, 941, 720, etc.)	Year(s) or Period(s)	Specific Tax Matters
1	INCOME	1040	2023 - 2024	NOT APPLICABLE
2	INCOME	1040	2025 - 2027	NOT APPLICABLE

**4 Specific use not recorded on the Centralized Authorization File (CAF).** If the tax information authorization is for a specific use not recorded on CAF, check this box. See the instructions. If you check this box, skip line 5. ☐

**5 Retention/revocation of prior tax information authorizations.** If the line 4 box is checked, skip this line. If the line 4 box is not checked, the IRS will automatically revoke all prior tax information authorizations on file unless you check the line 5 box and attach a copy of the tax information authorization(s) that you want to retain.  
To revoke a prior tax information authorization(s) without submitting a new authorization, see the line 5 instructions. ☐

**6 Taxpayer signature.** If signed by a corporate officer, partner, guardian, partnership representative (or designated individual, if applicable), executor, receiver, administrator, trustee, or individual other than the taxpayer, I certify that I have the legal authority to execute this form with respect to the tax matters and tax periods shown on line 3 above.

**▶ IF NOT COMPLETED, SIGNED, AND DATED, THIS TAX INFORMATION AUTHORIZATION WILL BE RETURNED.**

**▶ DON'T SIGN THIS FORM IF IT IS BLANK OR INCOMPLETE.**

Signature: Date: 2025-09-26  
Test Test  
First Name: Last Name: Title (if applicable):

For Privacy Act and Paperwork Reduction Act Notice, see the instructions. Cat. No. 11080P Form 8821 Rev. 01-2021

Start signing

PandaDoc Clarity - IRS 8821 by Clarity Financial

Clarity Form 1077

**Consent to Tax Information Authorization Consent**  
To process your application, we integrate with the IRS. With your consent, the schools you've applied to will be able to receive your IRS tax information securely and confidentially.

**Purposes for using information**  
For use by Clarity and tax transcript service provider, Halcyon SMI Water LLC ("Halcyon"), 25 Broad St, Red Bank, NJ 07701 to retrieve and analyze your financial information (as defined below) as requested by the sponsoring institution(s) named below to facilitate your application(s), including, but not limited to, transmitting such information to any financial institution, bank or other service provider to which your application is submitted by the sponsoring institution.

Halcyon is a tax preparer and 3rd party provider licensed with the IRS to retrieve tax information. By logging into your IRS online account and approving the "Authorization Request" from Clarity you will be providing consent to Halcyon to retrieve your financial information and to utilize it as provided for herein, including the forwarding of it to Clarity. Note the Authorization Request will list the specific individual at Halcyon responsible for retrieving your financial information which will be either James McGowan or Elizabeth Boonin, both officers of Halcyon who are individually authorized by, and registered with, the IRS for the purpose outlined above.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use or disclose your financial information, including your tax transcript data, to third parties for purposes other than those directly related to the Services provided without your consent. If you consent to the use and disclosure of your financial information, federal law may not prevent your financial information from further use or distribution.

**Information used**  
Your "financial information" is defined as any data element obtained through the tax data retrieval process or other financial services, including but not limited to, IRS tax transcript data and source documents, information derived from tax transcript elements, or other information provided related to your financial situation. In addition to the use noted above, you consent to Halcyon using your financial information in connection with any approved use provided for in the Gramm-Leach-Bliley Act, including determining relevant financial offers, quality control testing, to create, test, train and inform Halcyon's algorithms, machine learning, and for its product development and product automation purposes. In no case shall your financial information be used in any way inconsistent with this consent.

If you believe your financial information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-365-4434, or by email at [complaint@tigrs.treasury.gov](mailto:complaint@tigrs.treasury.gov).

**Name, and address of recipient**  
Clarity Financial, Inc.  
2810 N Church St, Suite 3E140  
Wilmington DE 19802-4447

This consent will remain in effect during the term of your loan for servicing and administrative purposes. If you consent to the use of your financial information as provided for above, please sign below.

Signature:

Test Test  
2025-09-26

Start signing

Form 4506-C Department of the Treasury - Internal Revenue Service OMB Number 1545-1872

**IVES Request for Transcript of Tax Return**  
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](https://www.irs.gov) and search IVES.

**1a. Current name**  
1. First name: Adam  
2. Middle initial: M  
3. Last name/BMF company name: Meredith

**2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers)**  
1. Spouse's first name: Meredith  
2. Middle initial: M  
3. Spouse's last name: Meredith

**3a. First taxpayer identification number (see instructions)**  
Social Security Number or Tax Identification Number: 123-45-6789

**3b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)**

**4. Previous name shown on the last return filed (if different from line 1a)**  
1. First name: Adam  
2. Middle initial: M  
3. Last name: Meredith

**4c. Spouse's previous name shown on the last return filed (if different from line 2a)**  
1. First name: Meredith  
2. Middle initial: M  
3. Last name: Meredith

**5. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)**  
a. Street address (including apt., room, or suite no.): 1234 Main St  
b. City: New York  
c. State: NY  
d. ZIP code: 10001

**5c. Previous address shown on the last return filed (if different from line 5) (see instructions)**  
a. Street address (including apt., room, or suite no.):  
b. City:  
c. State:  
d. ZIP code:

**6. Customer ID number (if applicable) (see instructions)**

**7. IVE's participant name, ID number, SOR mailbox ID, and address**  
1. IVE's participant name: NYS TRV Processing  
2. Street address (including apt., room, or suite no.): P.O. Box 1589  
3. City: Harrisburg  
4. State: PA  
5. ZIP code: 17103

**8. IVE's participant ID number**  
a. IVE's participant ID number:  
b. SOR mailbox ID:

**9. Street address (including apt., room, or suite no.)**  
a. City: Harrisburg  
b. State: PA  
c. ZIP code: 17103

**10. Unique identifier (if applicable) (see instructions)**

**11. Client name, telephone number, and address (this field cannot be blank or not applicable (N/A))**  
a. Client name: Clarity Financial  
b. Telephone number: 202-210-3752  
c. Street address (including apt., room, or suite no.): 2810 N Church St, Suite 3E140  
d. City: Wilmington  
e. State: DE  
f. 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 (e.g., 1040, 1099, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts.  
1040:  
a. Return Transcript ☒ b. Account Transcript ☐ c. Record of Account ☐

**7. Wage and Income transcript (W-2, 1099-E, 1099-G, etc.)** ☒ W2

**8. Enter a max of three form numbers here. If no entry is made, all forms will be sent.** W2

**9. 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 ☒ Line 2a ☐

**10. 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.

☒ **Signatory attests that he/she has read the above attention clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.**

**Signature for Line 1a (see instructions)**  
Signature: Date: 2025-10-01 Phone number of taxpayer on line 1a or 2a: 1112223344  
Form 4506-C was signed by an Authorized Representative ☒ Signatory confirms document was electronically signed

**PrintType name**  
Adam Meredith

**Sign Here**  
Title (if line 1a above is a corporation, partnership, estate, or trust):

**Spouse's signature (required if listed on Line 2a)**  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Form 4506-C was signed by an Authorized Representative ☐ Signatory confirms document was electronically signed

**PrintType name**

Catalog Number 72627P www.irs.gov Form 4506-C (Rev. 10-2022)  
For Privacy Act and Paperwork Reduction Act Notice, see page 2.

Start signing


## STEP 2 - VERIFY YOUR IDENTITY

- Each guardian will need to complete this verification step. If the other guardian is not available, you will have the option to send them an email with the steps.
- The verification can either be completed on the device you are using, or a different device if it's easier. (Computer with camera, mobile phone, tablet)

1

Identity verification for Test

We need some information to help us confirm your identity. It should take less than 2 minutes.



By clicking the button below, you consent to Persona, our vendor, collecting, using, and adding to service providers to process your biometric information to verify your identity, identify fraud, and improve Persona's platform in accordance with its [Privacy Policy](#). Your biometric information will be stored for no more than 3 years.

Begin verifying

I saved my ID with Persona

English

SECURED WITH persona

2

Identity verification for Test

<

What country is your government ID from?

This helps us determine the best way to verify your identity.

United States

Select

3

Identity verification for Test

<

Upload a photo ID

We require a photo of a government ID to verify your identity.

Choose 1 of the following options

Driver's License

>

State ID

>

Passport

>

Passport Card

>

Permanent Resident Card

>

Non-Citizen Travel Document

>

Visa

>

Work Permit

>


4

Identity verification for Test

<

Front of driver license

Take a clear photo of the front of your driver license.



Take a photo


Upload a photo

Continue on another device

5

Last step - let's make sure it's you

We require a photo of your face in order to verify your identity.



Take a picture from your current device


Take a picture with another device

Identity verification for Test

<

Continue on another device

To verify your identity, we need access to a camera. We'll send you a secure link for continuing on your phone. You can scan the QR code or click one of the below buttons.



Send an email

If you select "Continue on another device", you can either scan the QR code with your mobile device or send an email with an access link.



## STEP 3 - SUBMIT YOUR APPLICATION

- Once verification is completed for all guardians, you will be brought back to the page where you can submit your application.
- If verification failed through Persona, you can still submit the application. Our manual verification team will review it and reach out if any additional information is needed.

### Tax Verification

In order to understand a family's complete financial picture, schools require families to submit tax transcript(s) to verify income and financial information. In this section, you will be asked to e-sign a Form 8821 document. This document authorizes Clarity to securely pull your year 2024 tax transcripts from the IRS. We will not request your tax transcripts until you complete and submit your application. We will only share them with the school(s) to which you are applying.

**Please ensure your name, address, and SSN/TIN are correct.** Your name, address, and social security number or tax identification number should be entered exactly as they appear on your 2024 tax return. Incorrect information could prevent the IRS from sharing your transcripts, which will delay the processing of your application.

Finally, the IRS requires identity verification to help protect you and your tax information. Once your identity is verified, we won't ask you to verify it again in future years. If you have any questions or need assistance, please feel free to contact us [here](#).

To learn more about how we keep your data secure, [click here](#).

✓

Test Test has signed (pending verification)

☐

I certify that all the information provided in this application is accurate and complete to the best of my knowledge. I understand that submitting false or incomplete information may impact the processing of my application.

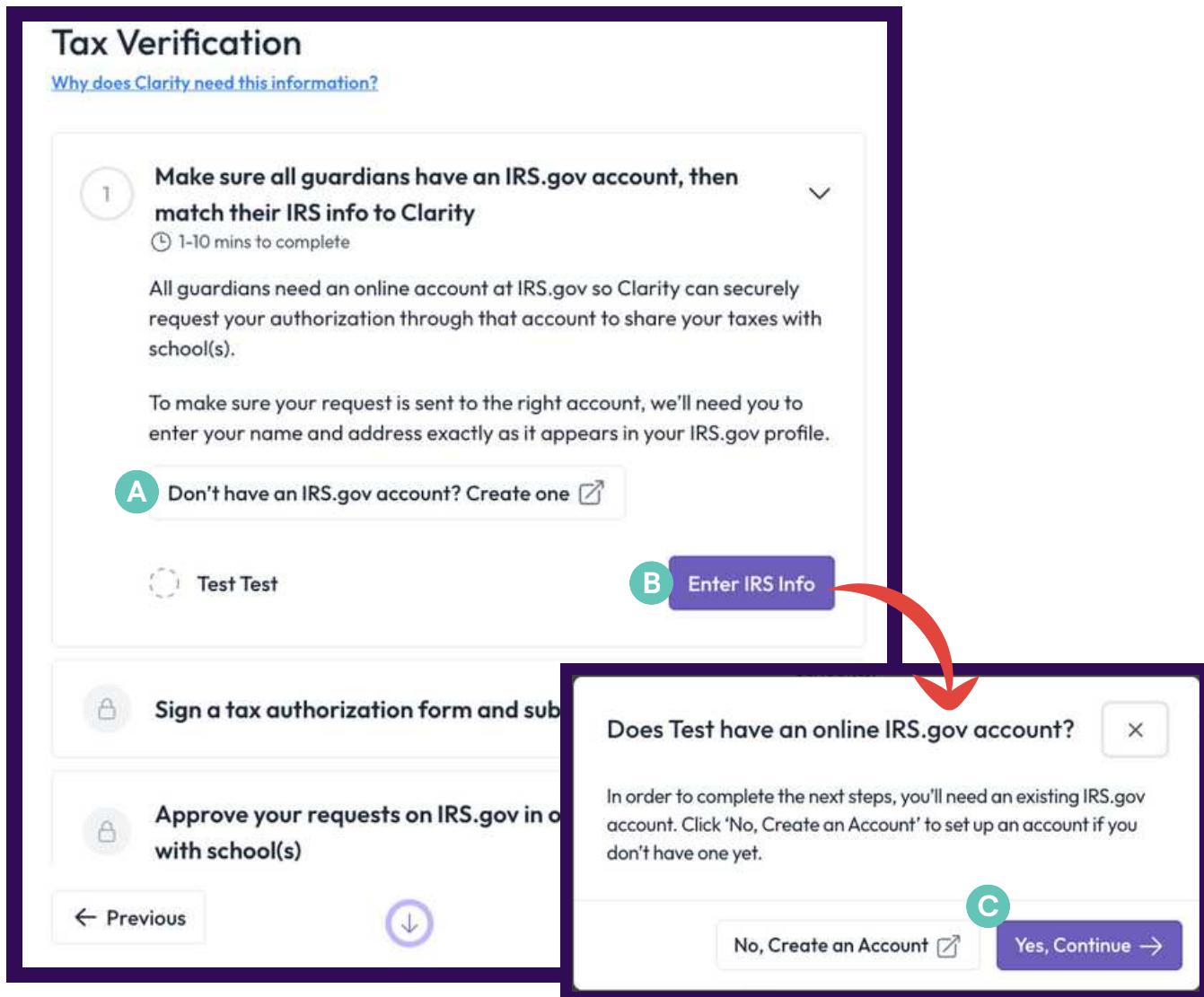
← Previous

Submit Application →

## IRS Verification Process

### STEP 1 - CREATE/CONFIRM IRS ACCOUNT

- Each guardian will need to create their own individual IRS account.
- If you already have an account, simply click the button to enter your IRS info and skip to page 10 of this guide.





**Tax Verification**  
[Why does Clarity need this information?](#)


**1 Make sure all guardians have an IRS.gov account, then match their IRS info to Clarity**  
⌚ 1-10 mins to complete


All guardians need an online account at IRS.gov so Clarity can securely request your authorization through that account to share your taxes with school(s).



To make sure your request is sent to the right account, we'll need you to enter your name and address exactly as it appears in your IRS.gov profile.


**A** Don't have an IRS.gov account? Create one 

 **B** Enter IRS Info



 Sign a tax authorization form and submit it to the school(s)

 Approve your requests on IRS.gov in order to share your taxes with school(s)

**Does Test have an online IRS.gov account?** 

In order to complete the next steps, you'll need an existing IRS.gov account. Click 'No, Create an Account' to set up an account if you don't have one yet.

**C** No, Create an Account  Yes, Continue 

**A** If any guardians in the household do not have an IRS account, click this button to create one.  
(See pages 4-9 for step-by-step instructions on the creation process)

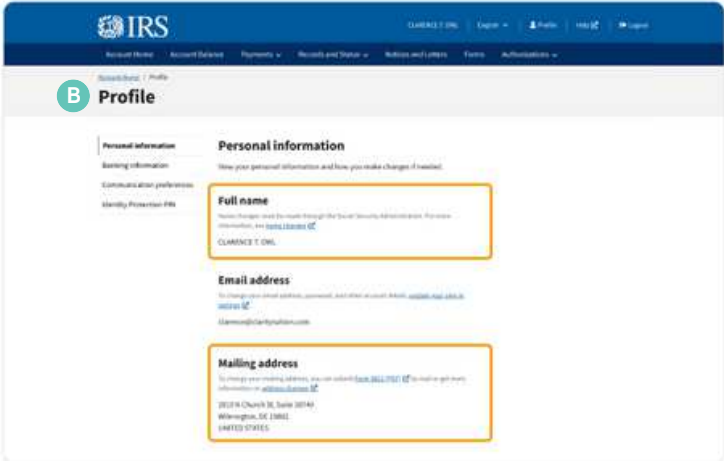
**B** Once created, or if you already have an IRS account, click the "Enter IRS Info" button to add your name and address. (See next page for more details)

**C** A confirmation box will pop-up to confirm that the guardian has an IRS account. Once you have an account, click the "Yes, Continue" button to proceed.

## STEP 1 - CREATE/CONFIRM IRS ACCOUNT (CONT'D)

Match Test's Information to Their IRS.gov Profile

- A** [Click here](#) to go to your IRS profile.
- You will see your full legal name and your current mailing address.
- Copy and paste or type your legal name and mailing address below, **exactly as it appears in your IRS profile**.



**C**

First Name from IRS

Last Name from IRS

Required

Mailing Address from IRS

Mailing Address Line 2  Optional

State

City

Postal Code

**D**

**A** Click the link to go straight to your IRS profile page.

**C** Enter your name and address EXACTLY as it appears on your IRS profile

**B** Refer to the screenshot to find where to locate your IRS name and address.

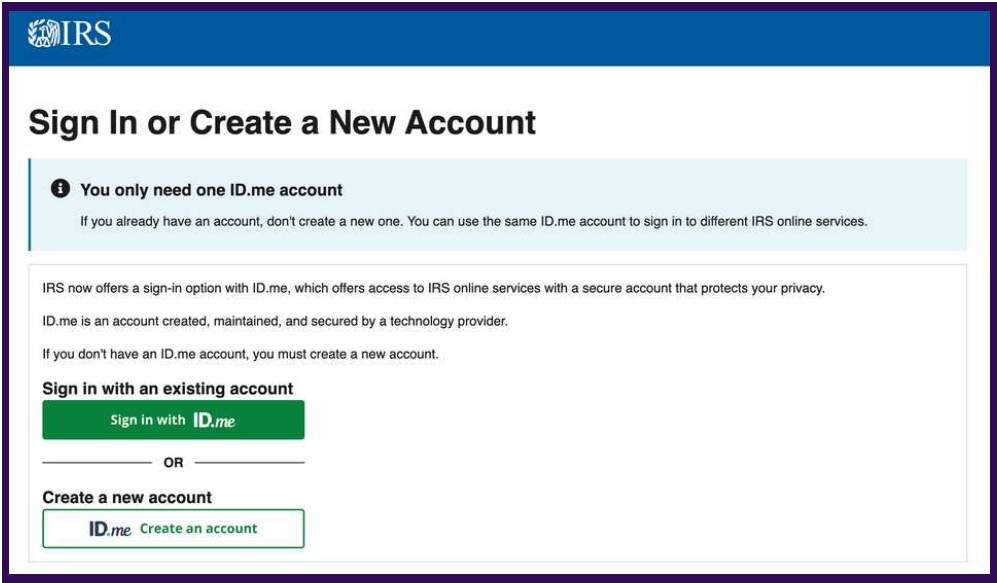
**D** Once everything is entered, click the Finish button to move to the next step



## STEP 2 - IRS ACCOUNT CREATION

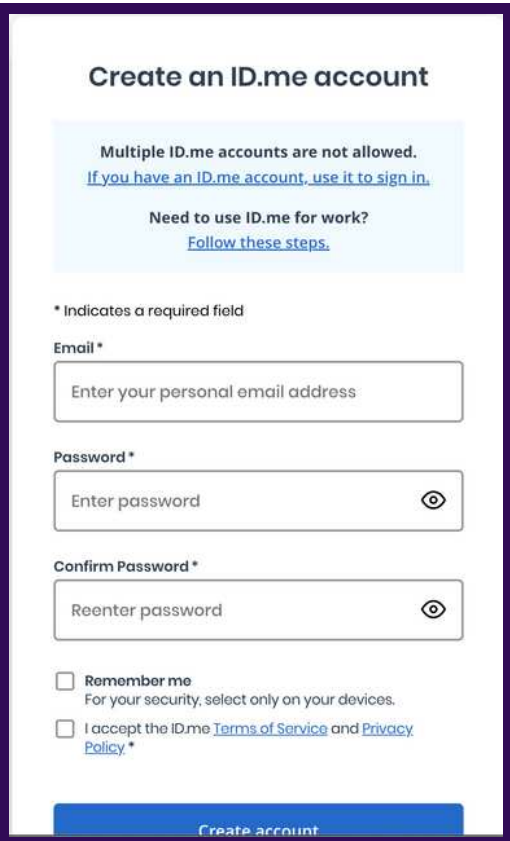
- If you already have an IRS account through ID.me, you do not need to complete these steps. Skip ahead to page 10 for the next steps in the Clarity process.
- These steps are completed outside of Clarity’s scope. If you have any questions or encounter issues verifying your account, visit: [ID.me Support](#)

Click the Create an Account button to get started

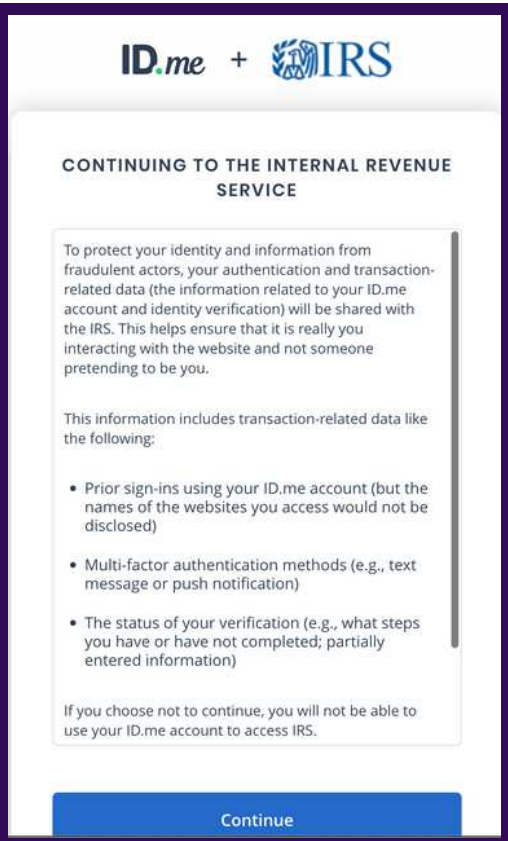


The screenshot shows the IRS website's sign-in page. At the top is the IRS logo. Below it is the heading "Sign In or Create a New Account". A light blue box contains an information icon and the text: "You only need one ID.me account. If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services." Below this, a paragraph explains that IRS now offers a sign-in option with ID.me, which offers access to IRS online services with a secure account that protects your privacy. It also states that ID.me is an account created, maintained, and secured by a technology provider, and that if you don't have an ID.me account, you must create a new account. There are two main options: "Sign in with an existing account" with a green button labeled "Sign in with ID.me", and "Create a new account" with a green button labeled "ID.me Create an account".

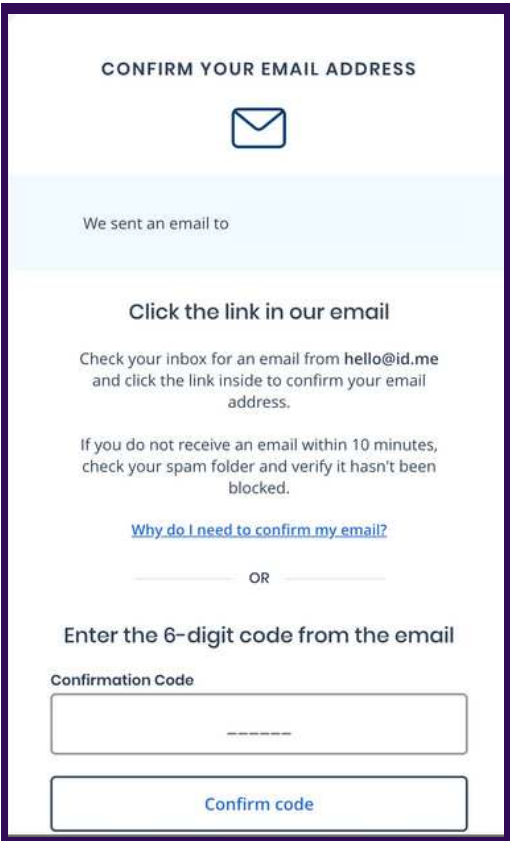
Fill out your log-in information and follow the prompts to confirm your email.



The screenshot shows the "Create an ID.me account" form. At the top is the heading "Create an ID.me account". Below it is a light blue box with the text: "Multiple ID.me accounts are not allowed. If you have an ID.me account, use it to sign in. Need to use ID.me for work? Follow these steps." Below this, there is a note: "\* Indicates a required field". The form has three required fields: "Email \*" with a text input box labeled "Enter your personal email address", "Password \*" with a text input box labeled "Enter password" and an eye icon, and "Confirm Password \*" with a text input box labeled "Reenter password" and an eye icon. At the bottom, there are two checkboxes: "Remember me" with the text "For your security, select only on your devices." and "I accept the ID.me Terms of Service and Privacy Policy \*". A blue button labeled "Create account" is at the bottom.



The screenshot shows the "CONTINUING TO THE INTERNAL REVENUE SERVICE" page. At the top is the ID.me + IRS logo. Below it is the heading "CONTINUING TO THE INTERNAL REVENUE SERVICE". A paragraph explains that to protect your identity and information from fraudulent actors, your authentication and transaction-related data (the information related to your ID.me account and identity verification) will be shared with the IRS. This helps ensure that it is really you interacting with the website and not someone pretending to be you. Below this, there is a list of three bullet points: "Prior sign-ins using your ID.me account (but the names of the websites you access would not be disclosed)", "Multi-factor authentication methods (e.g., text message or push notification)", and "The status of your verification (e.g., what steps you have or have not completed; partially entered information)". A paragraph at the bottom states: "If you choose not to continue, you will not be able to use your ID.me account to access IRS." A blue button labeled "Continue" is at the bottom.



The screenshot shows the "CONFIRM YOUR EMAIL ADDRESS" page. At the top is the heading "CONFIRM YOUR EMAIL ADDRESS" and an envelope icon. Below it is a light blue box with the text: "We sent an email to". Below this, there is a section titled "Click the link in our email" with the text: "Check your inbox for an email from hello@id.me and click the link inside to confirm your email address." Below this, there is a paragraph: "If you do not receive an email within 10 minutes, check your spam folder and verify it hasn't been blocked." Below this, there is a link: "Why do I need to confirm my email?". Below the link, there is a section titled "Enter the 6-digit code from the email" with a text input box labeled "Confirmation Code" and a blue button labeled "Confirm code".

## 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.

SECURE YOUR ACCOUNT


1

2

3

Set up multi-factor authentication (MFA)


Secure your account by selecting an MFA method.  
[Learn more about security levels](#)



Passkey

Trust this device? Quickly and securely sign in next time using this device's facial recognition, fingerprint, or PIN.


Very strong security



Text Message or Phone Call

Receive and enter a 6-digit code.


Fair security



Push Notification

Approve sign-in with the ID.me Authenticator mobile app.


Moderate security



Code Generator Application

Verify a 6-digit code from a code generator app.


Strong security



Security Key

Insert and tap a physical security key.

Very strong security



NFC-Enabled Mobile Security Key

Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

Very strong security

10

## 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.

ID.me + IRS

VERIFYING IS FAST AND EASY

Choose how to verify your identity from the options below

☒ Self-Service

Takes 5-10 minutes

Upload a driver's license or state ID, passport or passport card, and capture a selfie.

☐ Video Call

Takes 10 - 15 minutes

Upload a driver's license, state ID, passport, or passport card and join a quick video call.

Continue

[I don't have a driver's license, state ID, passport, or passport card.](#)

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me...

I acknowledge that I have received, read, and agreed

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.


Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's license or state ID [Change document](#)

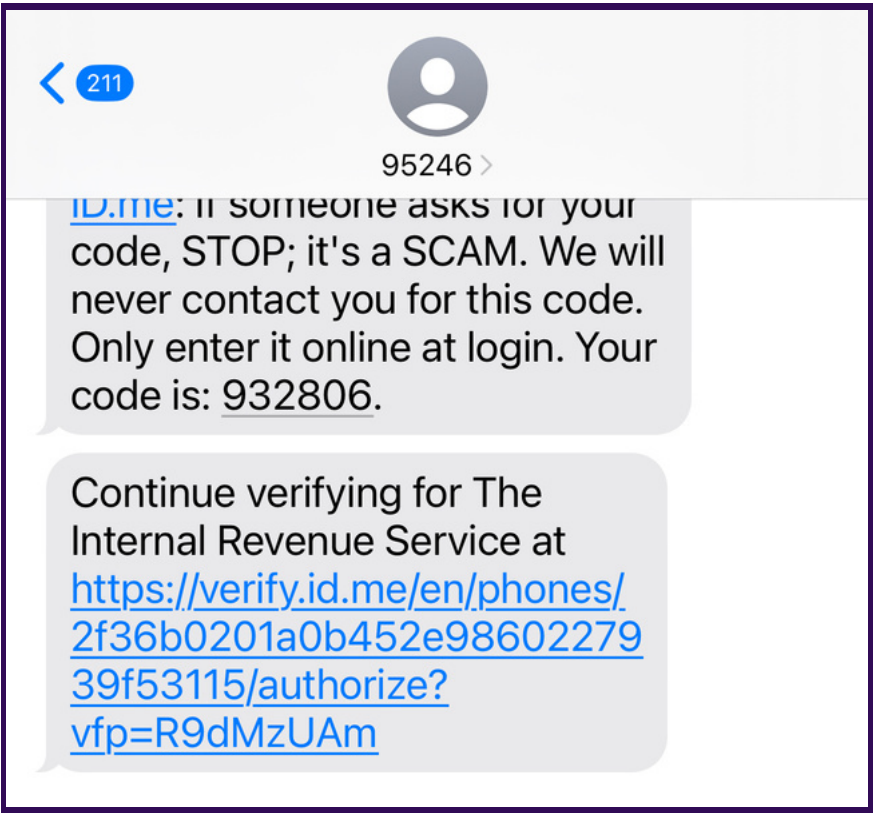
Mobile Phone Number \*



Your smartphone must have a camera and a web browser.

By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

Continue





## STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to take photos of your identification.

1

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

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

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)

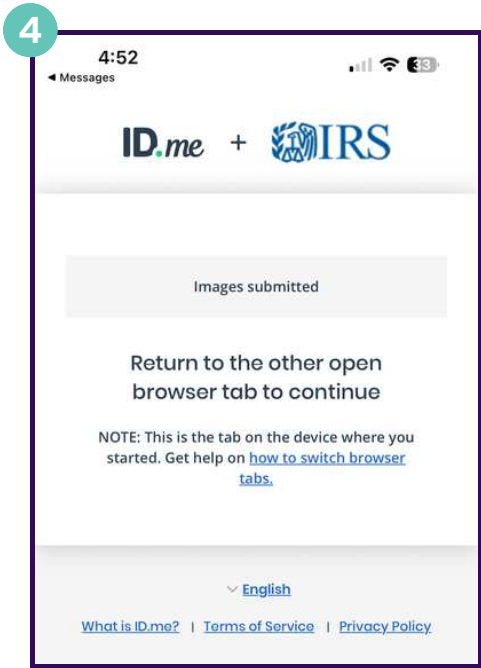
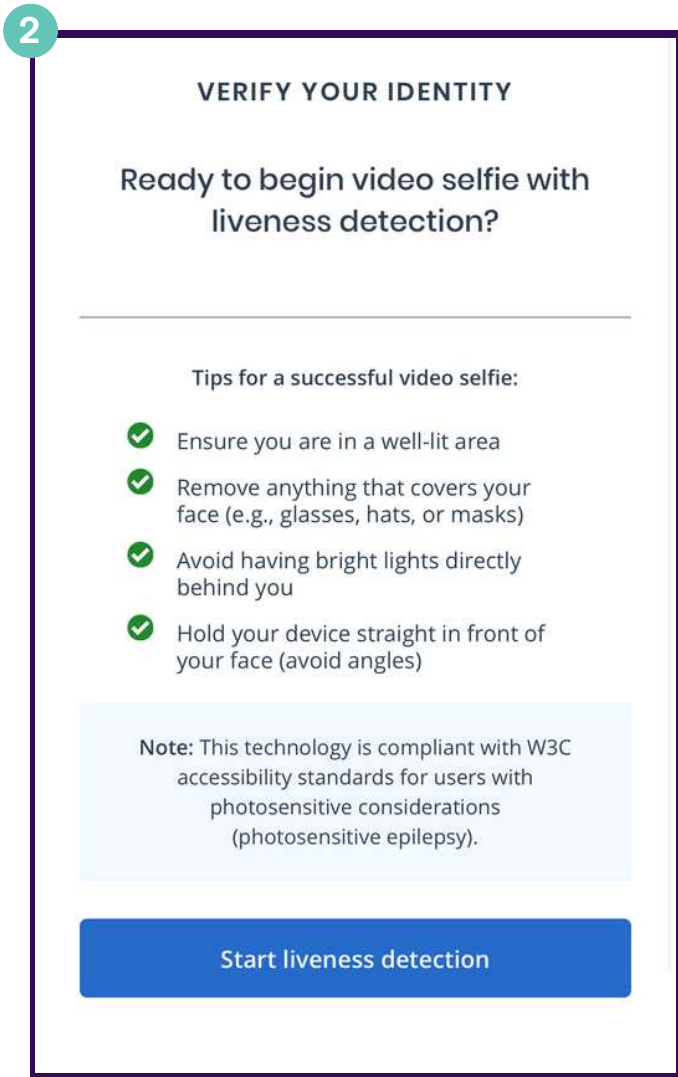
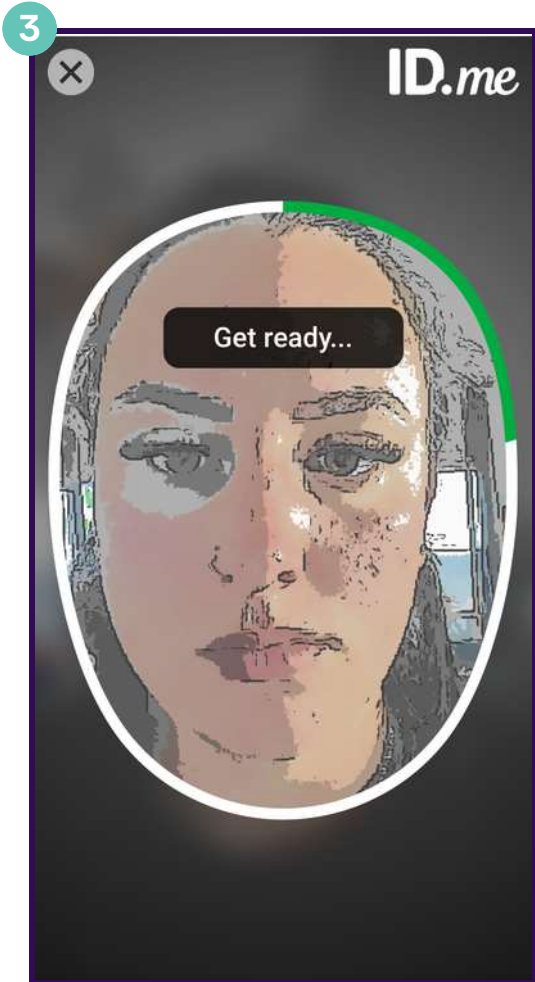
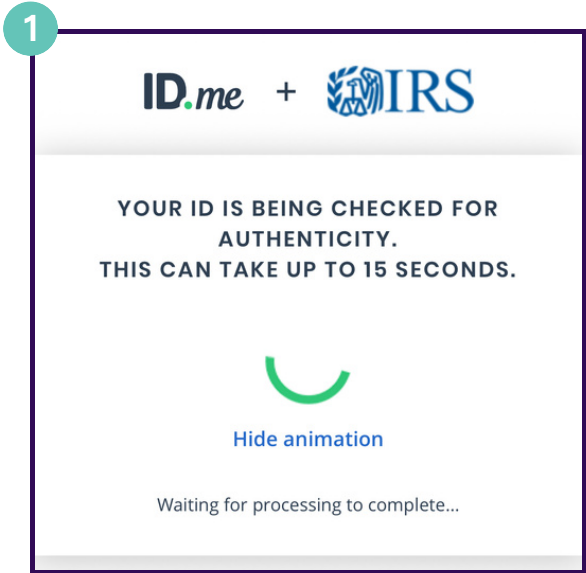
Take a different photo (back)

Submit your photos



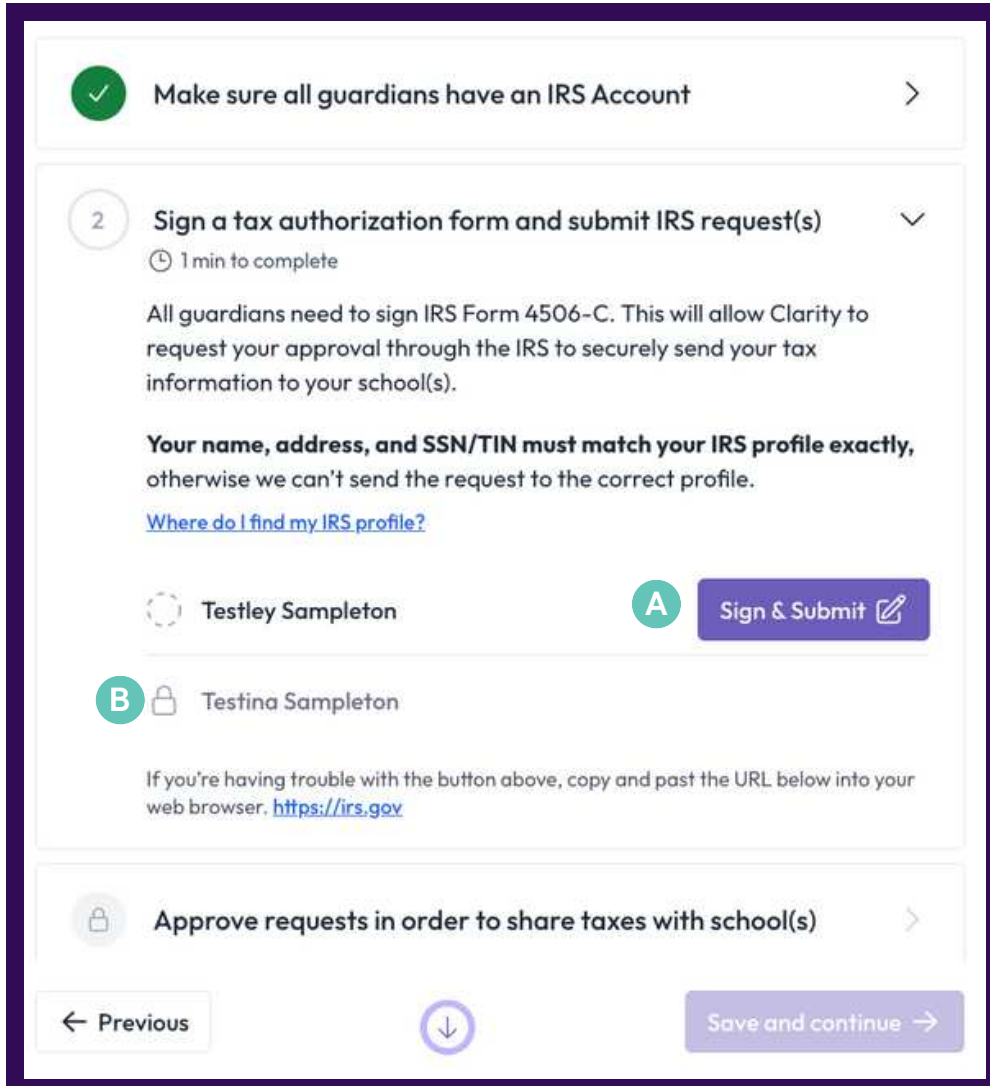
## STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

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



## STEP 4 - TAX VERIFICATION FORM

- Once all guardians have checked the box confirming that they 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.



✓ Make sure all guardians have an IRS Account >

2 Sign a tax authorization form and submit IRS request(s) ✓

⌚ 1 min to complete

All guardians need to sign IRS Form 4506-C. This will allow Clarity to request your approval through the IRS to securely send your tax information to your school(s).

**Your name, address, and SSN/TIN must match your IRS profile exactly,** otherwise we can't send the request to the correct profile.

[Where do I find my IRS profile?](#)

Testley Sampleton A Sign & Submit

B Testina Sampleton

If you're having trouble with the button above, copy and past the URL below into your web browser. <https://irs.gov>

Approve requests in order to share taxes with school(s) >

← Previous ↓ Save and continue →

**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.

**Clarity - IRS 4506c** 1 of 1 document

**Form 4506-C** (October 2022) OMB Number 1545-1872

Department of the Treasury - Internal Revenue Service  
**IVES Request for Transcript of Tax Return**

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](http://www.irs.gov) and search IVES.

**1a. Current name**  
 i. First name: B. Middle initial: J. Last name: Sampson  
 ii. Last name/other company name: Sampson  
 iii. Taxpayer identification number (see instructions): [Redacted]

**2a. Spouse's current name** (if joint return and transcripts are requested for both taxpayers)  
 i. Spouse's first name: [Redacted] ii. Spouse's last name: [Redacted]  
 iii. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers): [Redacted]

**3. Previous name shown on the last return filed if different from line 1a**  
 i. First name: [Redacted] ii. Middle initial: [Redacted] iii. Last name: [Redacted]  
 iv. Previous name shown on the last return filed if different from line 1a (see instructions): [Redacted]

**4. Current address** (including apt., room, or suite no.), city, state, and ZIP code (see instructions)  
 i. Street address (including apt., room, or suite no.): 285 Du Page St  
 ii. City: Mahomet iii. State: IL iv. ZIP code: 61853  
 v. Previous address shown on the last return filed if different from line 3 (see instructions): [Redacted]  
 vi. Former address (including apt., room, or suite no.): [Redacted] vii. City: [Redacted] viii. State: [Redacted] ix. ZIP code: [Redacted]

**5a. IVES participant name, ID number, SOI mailbox ID, and address**  
 i. IVES participant name: IVES TRV Processing  
 ii. IVES participant ID number: [Redacted] iii. SOI mailbox ID: [Redacted]  
 iv. Street address (including apt., room, or suite no.): P.O. Box 1089  
 v. City: Hammonton vi. State: NJ vii. ZIP code: 08037  
 viii. Customer file number (if applicable) (see instructions): [Redacted] ix. Unique identifier (if applicable) (see instructions): [Redacted]

**5b. Client name, telephone number, and address** (this field cannot be blank or not applicable (N/A))  
 i. Client name: Clarity Financial  
 ii. Telephone number: 206-210-9762  
 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 5b. (Ensure that lines 5 through 8 are completed before signing. (see instructions))

**6. Transcript requested:** Enter the tax form number here (1040, 1095, 1125, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts.  
 i. 1040  
 ii. Return Transcript ☒ iii. Account Transcript ☐ iv. Record of Account ☐  
 v. Wage and Income transcript (W-2, 1099-C, 1099-D, etc.) ☒

**7. Enter a mix of three form numbers here; if no entry is made, all forms will be sent:** W2  
 i. 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 ☒ Line 2a ☐  
 ii. Year or period requested. Enter the ending date of the tax year or period using the mm/yy 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 taxpayer 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.

**Signature of taxpayer(s):** [Redacted Signature] Date: 2025-07-31 Phone number of taxpayer on line 1a or 2a: 1111111111

**Sign Here**  
 i. Form 4506-C was signed by an Authorized Representative ☒ ii. Signatory confirms document was electronically signed ☒  
 Print/Type name: Textley Sampson  
 Title (if line 1a above is a corporation, partnership, estate, or trust):  
 Spouse's signature (required if listed on Line 2a): [Redacted Signature] Date: [Redacted]  
 i. Form 4506-C was signed by an Authorized Representative ☐ ii. Signatory confirms document was electronically signed ☐  
 Print/Type name: [Redacted]

Catalog Number 726271P 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.

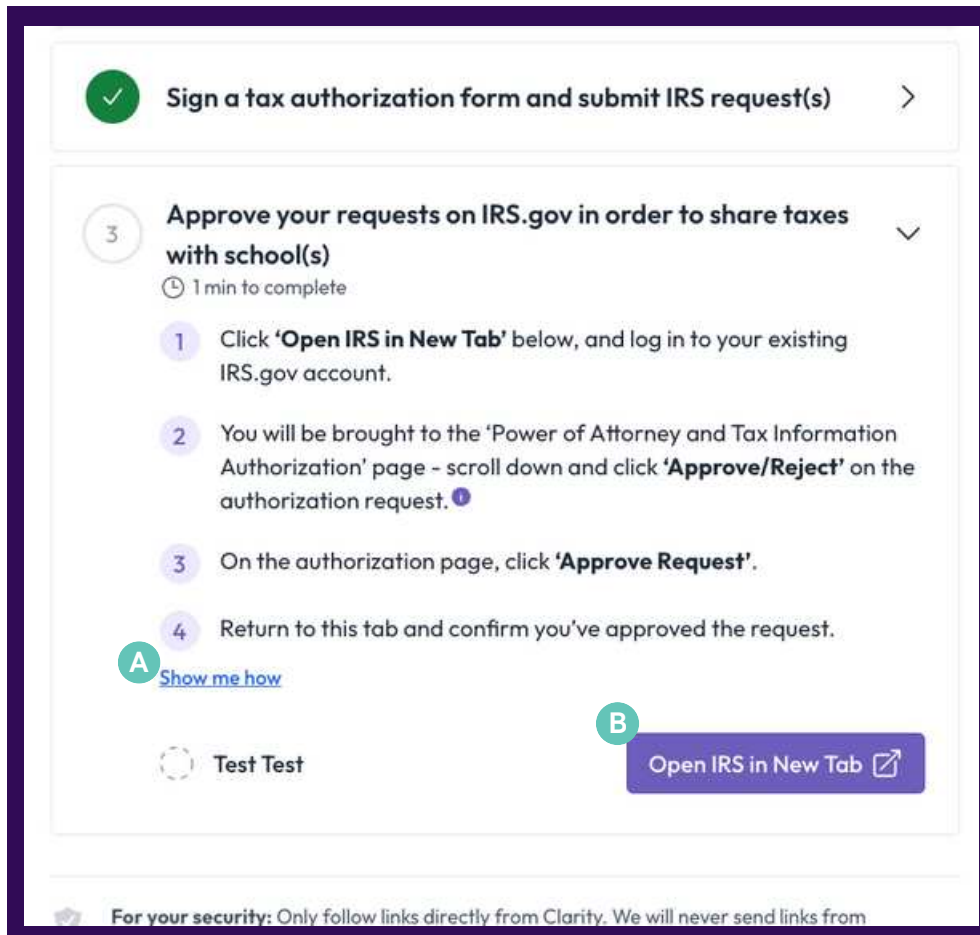
**B** Enter the guardian's social security number.

**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.

## STEP 5 - APPROVE DOCUMENT REQUESTS

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



The screenshot shows a step in a tax verification process. At the top, a green checkmark icon is next to the text "Sign a tax authorization form and submit IRS request(s)". Below this, a section titled "Approve your requests on IRS.gov in order to share taxes with school(s)" is marked with a circled number 3 and a dropdown arrow. Underneath the title, it says "1 min to complete". A list of four numbered steps follows: 1. Click 'Open IRS in New Tab' below, and log in to your existing IRS.gov account. 2. You will be brought to the 'Power of Attorney and Tax Information Authorization' page - scroll down and click 'Approve/Reject' on the authorization request. 3. On the authorization page, click 'Approve Request'. 4. Return to this tab and confirm you've approved the request. A green circle with the letter 'A' is next to a blue "Show me how" link. At the bottom left, there is a "Test Test" button with a circular arrow icon. At the bottom right, there is a purple button with the text "Open IRS in New Tab" and an external link icon. A green circle with the letter 'B' is next to this button. At the very bottom, a security notice reads: "For your security: Only follow links directly from Clarity. We will never send links from".

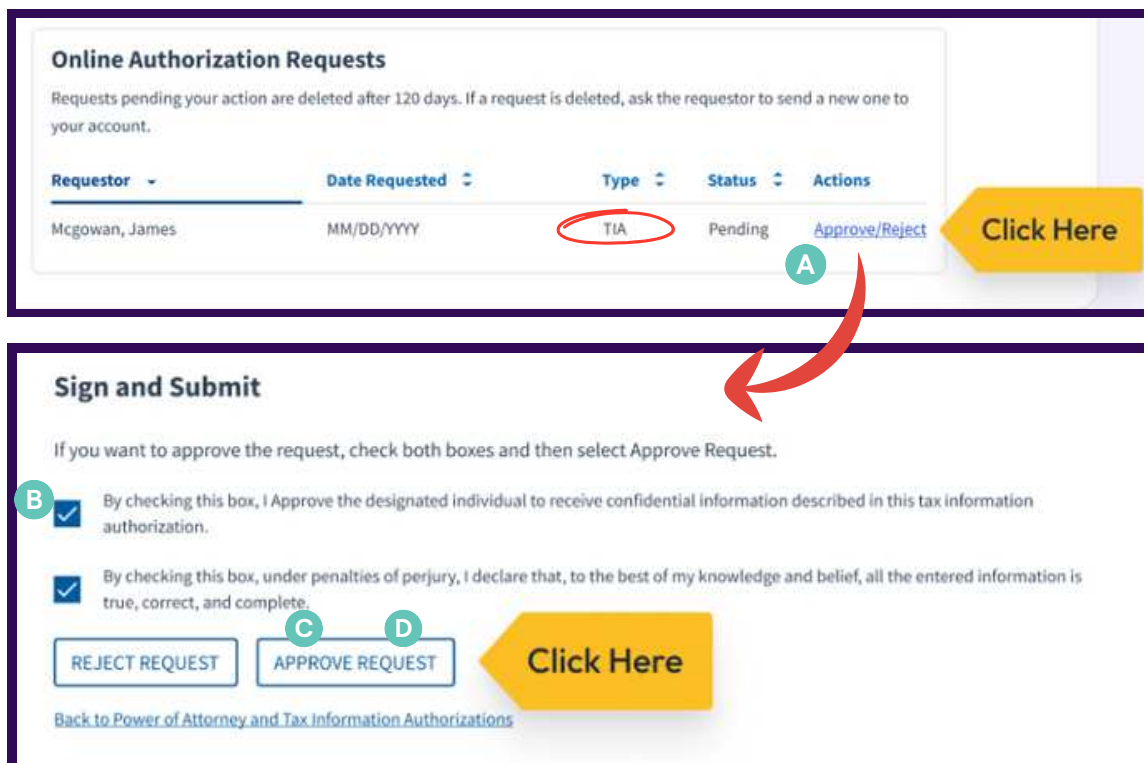
**A** The 'Show me how' link brings up a window providing the steps to take on the IRS website.

**B** Click "Open IRS in New Tab" to be taken to the IRS website. (See next page for the approval steps)

## STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

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

\*Note: the page on the IRS site is called “Power of Attorney and Tax Information Authorizations.” You will be authorizing Clarity, through our IRS-designated representatives James McGowan or Curtis Knuth, to access your tax records. You are not being asked to authorize a power of attorney. You can verify this by looking for the “TIA” in the “Type” column of the Online Authorization Request box (see below)



**Online Authorization Requests**

Requests pending your action are deleted after 120 days. If a request is deleted, ask the requestor to send a new one to your account.

Requestor	Date Requested	Type	Status	Actions
McGowan, James	MM/DD/YYYY	TIA	Pending	<a href="#">Approve/Reject</a>

**Sign and Submit**

If you want to approve the request, check both boxes and then select Approve Request.

☒ By checking this box, I Approve the designated individual to receive confidential information described in this tax information authorization.

☒ By checking this box, under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.

[Back to Power of Attorney and Tax Information Authorizations](#)

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 (see next page)



## STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

- After coming back to your application, you will see these pop-ups to confirm the authorization process on the IRS website.

**1**

**Do you see a Tax Information Authorization request in your online IRS account?**

Under the 'Power of Attorney and Tax Information Authorizations' section in your IRS.gov account, you should see the following request.

**A** Don't know where to find the request in your IRS account?  
[Show me how](#)

Have a question or need additional help?  
[Chat with support](#)

**D** No, I Don't See a Request

**B** Yes, I See a Request

**2**

**Did you click 'Approve' on the request?**

Once you click 'Approve/Reject' on the request, you will be taken to the request page itself. On this page, scroll down and click **'Approve Request'** to authorize.

**A** Don't know where to find the request in your IRS account?  
[Show me how](#)

Have a question or need additional help?  
[Chat with support](#)

**C** Yes, I Approved

No, I Did Not Approve

**A**

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

**B**

If you saw the authorization request on your IRS account, click "Yes, I See a Request" to confirm

**C**

On the next pop-up, if you approved the authorization, click the "Yes, I Approved" button to proceed.

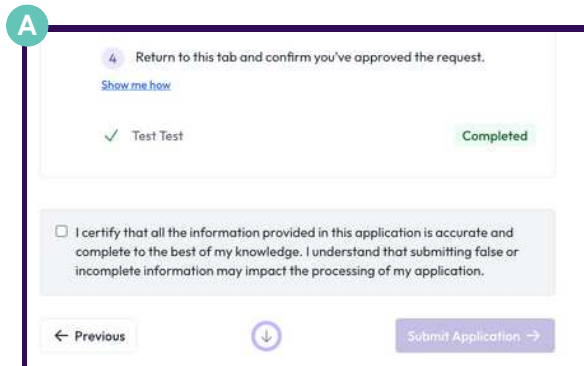
**D**

If you are not seeing an authorization request, click "No, I Don't See a Request" and follow the process on the next page

## STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

If you saw and approved the request:


**A**



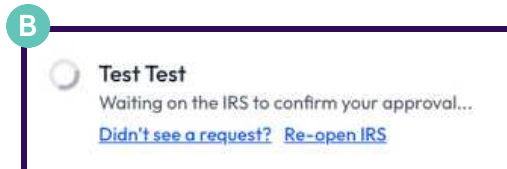
4 Return to this tab and confirm you've approved the request.  
[Show me how](#)

✓ Test Test Completed

☐ I certify that all the information provided in this application is accurate and complete to the best of my knowledge. I understand that submitting false or incomplete information may impact the processing of my application.

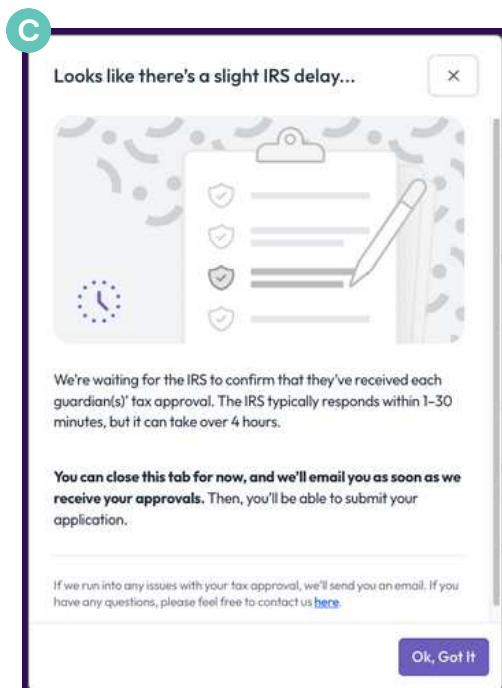
← Previous  Submit Application →

**B**



Test Test  
Waiting on the IRS to confirm your approval...  
[Didn't see a request?](#) [Re-open IRS](#)

**C**



Looks like there's a slight IRS delay... ×

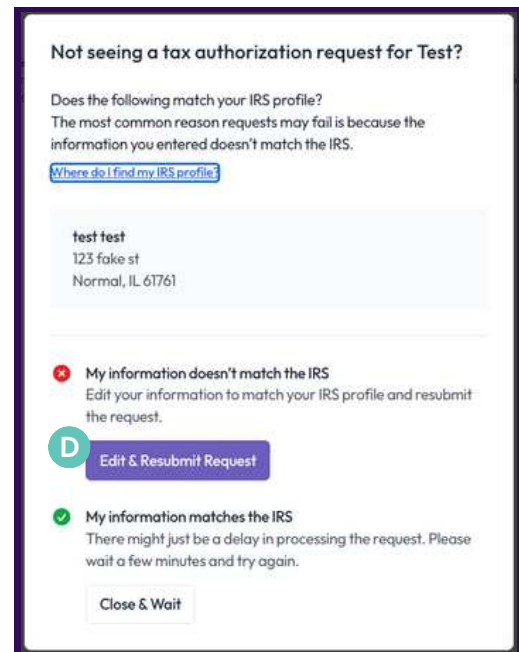
We're waiting for the IRS to confirm that they've received each guardian(s)' tax approval. The IRS typically responds within 1-30 minutes, but it can take over 4 hours.

You can close this tab for now, and we'll email you as soon as we receive your approvals. Then, you'll be able to submit your application.

If we run into any issues with your tax approval, we'll send you an email. If you have any questions, please feel free to contact us [here](#).

Ok, Got It

If you did not see the request:



Not seeing a tax authorization request for Test?

Does the following match your IRS profile?  
The most common reason requests may fail is because the information you entered doesn't match the IRS.  
[Where do I find my IRS profile?](#)

test test  
123 fake st  
Normal, IL 61761

✖ My information doesn't match the IRS  
Edit your information to match your IRS profile and resubmit the request.  
**D** Edit & Resubmit Request

✔ My information matches the IRS  
There might just be a delay in processing the request. Please wait a few minutes and try again.  
Close & Wait

**D** If you are not seeing an authorization request, follow the steps to confirm that your name and address match exactly what is on your IRS profile. Make any updates needed and then follow the steps on pages 12-13 again to approve

**A** Once you have approved the authorization, you should see a green checkmark next to all names. At this time, you can check the "I certify..." box and submit your application.

**B** While it can take less than 5-10 minutes for us to receive confirmation from the IRS, it does sometimes take several hours, even up to 24. You will see the spinning circle until confirmed. If it's been longer than 24 hours, reach out to Clarity support.

**C** After 10 minutes, you may see this box pop up. It is just a notification stating that it may take some time for us to receive the confirmation and to check back later.

Questions? You can view/download the Tax Verification FAQs PDF on the [Tax Verification help page](#)