



IRS EXPANDS PROGRAM TO PROTECT TAXPAYERS' IDENTITY

Effective as of January 2021, the IRS is allowing you to voluntarily opt-in to its Identity Protection PIN (“IP PIN”) program to protect your identity when you file a tax return.

The IP PIN program creates a six-digit number known only to you and the IRS and is used by the IRS to verify your identity when you file an electronic or paper tax return. It's meant to help taxpayers prevent their Social Security numbers from being used to file fraudulent federal income tax returns.

You can obtain an IP PIN three ways:

1. Use the online [“Get an IP PIN”](#) tool and verify your identity.
2. If unable to verify your identity, complete and file [Form 15227](#), which will be available for taxpayers with an annual adjusted gross income (AGI) of \$72,000 or less.
3. Taxpayers who cannot verify their identity or that they have an AGI of more than \$72,000 may be able to make an appointment to visit a Taxpayer Assistance Center. [Locate a Center near you.](#)

Gift Tax Exclusion

- The Get an IP PIN tool became available in mid-January.
- Taxpayers with either a Social Security number or Individual Taxpayer Identification Number who can verify their identity are eligible for the program.
- Any primary or secondary taxpayer or dependent can get an IP PIN, if they can prove their identity.
- This is the preferred method of obtaining an IP PIN and the only one that immediately reveals the PIN to taxpayers.



- Taxpayers who voluntarily opt-in to the IP PIN program do not need to file a Form 14039, Identity Theft Affidavit.
- The number is valid for one year. Each January, taxpayers must get a new one.
- The IP PIN must be entered correctly on electronic and paper tax returns to avoid rejections and delays.
- If you register for an IP PIN, retain it and provide it to your tax provider with your tax documents.
- The IRS plans to offer an opt-out feature to the IP PIN program in 2022.

IRS Form to File for ID Theft

There will be no change to the procedures involved in the event a taxpayer has a tax-related identity theft. For example, those who are not able to electronically file a tax return because a tax return was previously fraudulently filed under their Social Security number should still complete and file a [Form 14039, Identity Theft Affidavit.](#)

Work With Your Tax Professional and Wealth Advisor

At Mariner Wealth Advisors, our tax team and wealth advisors are in-house, so if you have questions about this program, contact either professional to help ensure your Social Security number is protected when you file a tax return.

Source:

["Get an Identity Protection PIN \(IP PIN\),"](#) irs.gov.

Additional fees may apply for tax planning and preparation services.

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