

ITIN APPLICATION ASSISTANCE IN 2026

ABOUT ME



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Fun Facts:

- Enrolled Agent
- Working at Foundation Communities since 2015

Our program:

- Certifying Acceptance Agent
- Complete 300+ applications and renewals annually

WHAT WE WILL COVER

- Recent Stats
- Informed Consent Messaging
- Our Process
- Q&A

RECENT STATS

Calendar Year 2024: 348 application

- Tax season: 217
- Summer: 131

Calendar Year 2025: 269 applications

- Tax season: 215
- Summer: 54

Calendar Year 2026: 138 applications (and counting)

- Tax season: 112
- Summer: 26

INFORMED CONSENT MESSAGING

What may prompt us to share this message:

- Taxpayer expresses **anxiety** about **immigration-related implications of filing a tax return**
- Taxpayer mentions **ICE** or another immigration-related agency
- Child/student from a **mixed-status household expresses worry** about the immigration implications of a **parent filing a tax return**
- Taxpayer **hesitates when reviewing the demographic or language questions** we ask during the tax preparation process
- Taxpayer is an **ITIN holder or applicant**

WHAT IS THE MESSAGE?

- We share the **potential risks and benefits** of filing, while reiterating that **we are not tax or legal advisors.**
- **The decision to file or not file is the client's.**
- Do **not** determine or assume a client's immigration status.
 - People in a variety of different legal statuses could be impacted by information-sharing agreement between the IRS and ICE.
- **Our role** is to **provide high-quality tax preparation** assistance to anyone seeking to file.
- We **honor and respect each taxpayer's informed decision** about whether to submit their return after it is prepared.

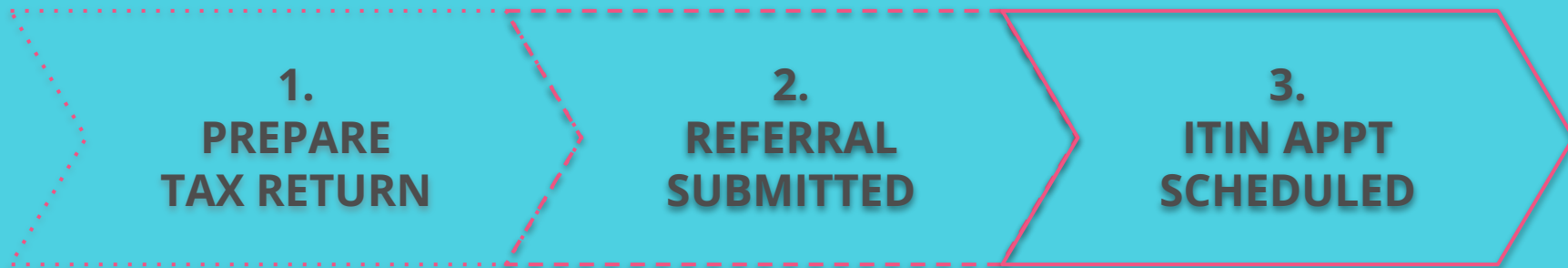
MESSAGING TO ALL ITIN APPLICANTS

Contrary to the historical IRS policy of protecting taxpayer confidentiality, the IRS may now be required to share your information with immigration authorities by request.



Al contrario de la política histórica del IRS de asegurar la confidencialidad de los contribuyentes, ahora es posible que el IRS esté obligado compartir su información con las autoridades de inmigración si se lo solicita.

OUR PROCESS



OPTIONS FOR SUBMISSION

The taxpayer's packet must be mailed or turned in at a Taxpayer Assistance Center (TAC).

- Taxpayer mails in original documents.
- Taxpayer makes an in-person appointment at a TAC.
- Taxpayer works with AA (who mails in original documents).
- **Taxpayer works with CAA** (who mails in copies of originals).

PERKS OF BEING A CAA

- Taxpayers **keep their original documents** in most cases
- You receive all application correspondence
 - Feedback about which applications are successful
 - Insight into changes or new interpretations of rules
 - Provide copies to the client if needed
- **You can call the ITIN Program Office directly**
 - **Ask questions**
 - **Advocate**

Questions?
