

Tax security checklist

Follow this step-by-step guide to help protect against tax fraud and identity theft this tax season.

Before filing

- ☐ Secure your paper and digital tax documents in a safe place
- ☐ Ensure all tax-related accounts have strong, unique passwords
- ☐ Enable multi-factor authentication on tax-related accounts for added protection
- ☐ Set up an Identity Protection PIN on your IRS account or by completing Form 15227
- ☐ Be on the lookout for IRS impersonation scams and fake tax preparers
- ☐ Verify your tax preparer’s credentials and ask about their data security and anti-scam procedures

While filing

- ☐ File your return as early as possible to reduce refund fraud risk
- ☐ Double-check your bank account details and routing number are accurate
- ☐ Choose a direct deposit refund for a faster, safer payment process
- ☐ Use a secure upload portal or encrypted messaging app to share sensitive data

After filing

- ☐ Securely store a copy of your filed return and shred any tax documents you no longer need
- ☐ Log out of your tax accounts, especially on shared devices
- ☐ Use the IRS Where’s My Refund? tool to track your refund status
- ☐ Watch for fake IRS notices or alerts that there was a problem with your return
- ☐ Monitor for signs of identity theft or fraud, like unexplained financial activity or credit report errors

Tax fraud red flags

-  Unsolicited communication from the IRS via email, text, or phone
-  Links that don’t lead to IRS.gov in emails or texts claiming to be from the IRS
-  Pressure to share sensitive data or file immediately, with threats of punishment if you don’t
-  Requests for immediate payment, including to “settle an outstanding tax debt”
-  Your tax preparer refusing to sign your return once it’s completed
-  Promises of unusually large tax refunds that seem too good to be true

For added protection, join LifeLock

-  Credit monitoring
-  Expert identity restoration support
-  Identity & Social Security alerts
-  Up to \$3m of potential coverage in case you need it

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