



## 2019.20 Training

### *Subject: Changed Name | Talking Points*

Have you changed your name lately? Whether because of marriage, divorce, or simply preference, if you change your name, you need to notify the IRS come tax time.

#### **Does a name change affect my taxes?**

If for any reason, such as marriage or divorce, your name changed this tax year, you must contact the proper authorities for a legal name change.

#### **How do I report a name change?**

Legally changing your name entails notifying the Social Security Administration (SSA), so they can change your name on your Social Security card. To do this, you must provide proof of your legal name change – this could be a marriage license or a decree of divorce.

It is important that the name the SSA has for your Social Security number agrees with the name on your tax return. If you try to e-file your tax return, it will be rejected if the name in the SSA's records differs from the name on your tax return.

#### **What if I have a different name on my W2 and Social Security Card?**

When you're gathering up documentation in preparation for filing your taxes, if your W-2 or 1099 has a name different from your identification, notify your employer, bank, or other payer of your new name.