Instructions for Requesting Borrower Transcripts

Line 1a & 1b
Cannot be blank. Full name and social security number must be listed here.

Line 3
This line must be the most recent address the IRS has on file for the borrower, regardless of years being ordered.

Line 4
If any other address was used to file for the years being requested, list it here.
NOTE: Only one address can be listed per line. For additional addresses, a separate 4506-T must be completed.

Box 8
Wage and Income transcripts are returned for every person listed on the 4506-T when box 8 is checked.

Line 9
You will receive all years requested on line 9 with your order.

Spouse Signature Line
If Wage and Income transcripts (box 8) are being requested, a dated signature for all parties listed on the 4506-T is required.

Form **4506-T**
(Rev. January 2012)
Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

▶ **Request may be rejected if the form is incomplete or illegible.**

OMB No. 1545-1872

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.
John Doe

1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
123-40-9999

2a If a joint return, enter spouse's name shown on tax return.
Jane Doe

2b Second social security number or individual taxpayer identification number if joint tax return
223-40-9999

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
123 Main St. Apt. 2, New York, NY 12345

4 Previous address shown on the last return filed if different from line 3 (see instructions)
456 Side St. Apt. 2, New York, NY 12345

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.

Advanced Data, LLC 212 E. Hartford St. Milford, PA 18337 (800) 537-0458 Participant #0000301548 Mailbox: AJADVANCED

Caution. *If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.*

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ **1040**

a **Return Transcript,** which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days ☐

b **Account Transcript,** which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days ☐

c **Record of Account,** which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days ☒

7 **Verification of Nonfiling,** which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days ☐

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2010, filed in 2011, will not be available from the IRS until 2012. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days ☒

Caution. *If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.*

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. **12/31/2012** **12/31/2013**

Check this box if you have notified the IRS or the IRS has notified you that one of the years for which you are requesting a transcript involved **identity theft** on your federal tax return ☐

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 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, **either** husband or wife must sign. If signed by a corporate officer, partner, 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-T on behalf of the taxpayer. **Note.** *For transcripts being sent to a third party, this form must be received within 120 days of the signature date.*

Sign Here

▶ John Doe — Signature (see instructions) — Date 5/2/14 — Phone number of taxpayer on line 1a or 2a **(555) 555-5555**

▶ Title (if line 1a above is a corporation, partnership, estate, or trust)

▶ Jane Doe — Spouse's signature — Date 5/2/14

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 1-2012)

Lines 2a & 2b
If requesting transcripts for a spouse, their full name and social must be listed here.

Line 5
This information must appear in its entirety on this line.

Line 6
If box 6a-6c are checked, 1040 must be on this line.

Box 6a, 6b, 6c
Transcripts returned for these boxes will only include the person listed on line 1 and their joint filers. If transcripts are needed for the person on line 2 and they did NOT file jointly for all years requested, a separate 450-6T must be completed.

Signature Line
A dated signature is required. Only persons listed on line 1 or 2 may sign here.

IMPORTANT
The IRS will not accept any edits or modifications.
Any changes including white out, cross-outs, scribbling, initialed changes etc., will most likely result in a rejected form.

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