



TIPS FOR COMPLETING FORM 4506-T

Line 1

- Make sure that the name the taxpayer used to file is listed on line 1a. In cases where the taxpayer's name has changed due to marriage, this may mean listing the maiden name on line 1a and the married name on line 3.
- Please double-check the social security number/EIN listed on line 1b for both legibility and accuracy, as this is the primary means the IRS uses in identifying taxpayers.

Line 2

This line should only be completed if the taxpayer jointly filed with another individual when filing returns with the IRS. If the taxpayer listed on line 2 did not file jointly with the person listed on line 1, we will only receive returns for the taxpayer listed on line 1. The exception to this is when Wage & Income Transcripts (box 8) are being requested; since there is no joint filing of W2's or 1099's, the IRS will return files for every person listed on the 4506-T.

Lines 3 & 4

- Only one address can be listed per line. Line 3 should list *the most recent address the taxpayer used to file with the IRS* (this would include any addresses used when filing amended returns). If the address a taxpayer is currently living at has not been used to file with the IRS, it should not be listed on the 4506-T. Line 4 should list any previous address that might have been used for the filing years being requested. If more than two addresses were used for the filing years requested, separate 4506-T's must be completed.
- Apartment, unit, floor, suite or building numbers must be listed with addresses, *even if these may not have been listed on the original filing sent to the IRS*. Addresses used on tax returns are verified through the IRS address database and adjusted for accuracy before being converted to transcript form. As a result, if information is missing from an address when the return is originally received, it will be added when converted to transcripts. Listing complete addresses will avoid unnecessary rejections.

Line 5

The following information must be listed on line 5 of the 4506-T:

Advanced Data
212 E. Harford St.
Milford, PA 18337
(800) 537-0458
Participant # 0000302919
Mailbox: AJADVANCED

Failure to list this information may cause delays and/or rejections on orders.

Lines 6-8

- If box 6a, 6b, or 6c is checked, the type of transcript being requested must be listed on line 6.
 - If the order is for personal tax transcripts, '1040' should be listed on this line.
 - If ordering for a trust, '1041' should be listed on this line.
 - If the order is for business tax transcripts, '1065' or one of the 1120 series types should be listed. For 1120's, the exact form type used to file must be listed.
- Nothing needs to be listed on line 6 if only Wage & Income transcripts (box 8) are being ordered. PLEASE NOTE: Wage & Income transcripts are not available for business transcript orders (Form 1120 or 1065).
- Box 6a – Return Transcripts
 - This box should be checked if you are ordering a standard tax transcript.
- Box 6b – Account Transcript (AT)
 - This box should be checked if you want information other than the return, like amendments, extensions, etc. PLEASE NOTE: If ordering for a trust, this box must be checked, as it is the only transcript type that can be ordered by third parties.
- Box 6c – Record of Account (ROA)
 - This box should be checked if you want a combination of both 6a and 6b.
- Box 7 – Verification of Non-Filing
 - When an individual has not filed taxes in the past 5 years, or has never filed taxes at all, then traditional transcripts cannot be ordered for them. In these situations, the only thing they can request is a Verification of Non-Filing letter (VON) from the IRS. These requests are ordered from a different department than normal transcripts, and they are not delivered electronically. All requests are filled via USPS. As a result, these types of requests take a minimum of 10-14 business days to complete.
- Box 8 – Wage and Income Transcripts
 - This box should be checked for any wage and income information (W2, 1099, 1098, 5498, etc.)

Line 9

- The IRS will only accept tax transcript requests for the last four previous tax years.
- Years should be listed in the MM/DD/YY or MM/DD/YYYY format.
 - For personal tax transcripts, the year-end should be the date used (12/31/YYYY).
 - For business tax transcripts, the date(s) listed on line 9 of the 4506-T should be the fiscal year-end dates for the business transcripts being requested. Not every business has a fiscal year-end of 12/31; if the date is different, this needs to be listed correctly to receive transcripts.

Attestation Box

This box (between Line 9 and the signature area) is very often overlooked when the 4506-T is being completed; however, it is required by the IRS to be checked. Please make sure the taxpayer checks this box when signing.

Signature Area

- All 4506-T's must have at least one taxpayer's signature. The person signing the 4506-T must be listed on either line 1a or 2a.
- Signatures must be dated within 120 days of the current date. Any 4506-T's without a signature date, with a date older than 120 days, or with an illegible or incomplete date will be rejected.
 - If the signature date is on the outside limit of the 120-day period, and may expire within the 3 to 4 business day timeframe the IRS quotes for normal order processing, it may be wise to request an updated form from the client.
- If Wage & Income transcripts are being requested, all taxpayers listed on the 4506-T must sign & date the form.
- If 1120's or 1065's are being requested, the title the signer holds with the company must be listed on the Title line below the signature.