How to Complete a Form 4506-T for *Personal* Returns

Make sure font is in black and LARGE and READABLE.

Enter one previous address on file with the IRS for the years requested.

Leave 5b blank.
(For third party use only)

Enter 1040 or leave line blank if requesting box 8.

Enter tax years requested.
Up to 4 past years available.

Signature attestation box must be checked.

Signatures need to be in black and legible to the IRS.

Form **4506-T**
(September 2018)
Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

▶ Do not sign this form unless all applicable lines have been completed.
▶ Request may be rejected if the form is incomplete or illegible.
▶ For more information about Form 4506-T, visit *www.irs.gov/form4506t*.

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 "Get a Tax Transcript..." under "Tools" 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)
123-45-6789

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
987-65-4321

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
123 Main Street City, State Zip

4 Previous address shown on the last return filed if different from line 3 (see instructions)
987 Central Ave. City, State Zip

5a 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.
c/o Tax Verification Services 30 Executive Park, Suite 200, Irvine, CA

5b Customer file number (if applicable) (see instructions)

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 tax 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 1120-A, Form 1120-H, Form 1120-L, 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 10 business 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 10 business 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 2011, filed in 2012, will likely not be available from the IRS until 2013. 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 10 business 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. 12/31/2017 | 12/31/2016 | / / | / /

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, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, 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:** This form must be received by IRS within 120 days of the signature date.

☒ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a
(888)555-1234

Sign Here

▶ John Doe — Signature (see instructions) — Date 09/26/2018

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

▶ Jane Doe — **Spouse's signature** — Date 09/26/2018

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 9-2018)

Enter most current address on file with the IRS.

Line 5 needs to read exactly as printed.

Check only one of these boxes for tax transcript data.

OR

Check box 8 for income data such as W-2 & 1099.

Date may not look or be altered. Valid for 120 Days.

Still need help? Call our Customer Happiness Team at **800.969.5100**!

How to Complete a Form 4506-T for *Business* Returns

Enter name of corporation or partnership. Leave line 2 blank.

Enter address that matches the address on file with the IRS.

Enter return type on line 6. You may order either:

- 1120 – Corporation transcripts
- 1065 – LLC or partnership transcripts

Enter FISCAL tax years requested. Up to 4 past years available.

Enter signature and business title, please see attached list of acceptable business titles below.

- **1065/1065 LLC:** Partner, Limited Partner
- **1120/1120S:** President, Vice President, Secretary, Treasurer, Assistant Treasurer, Chief Accounting Officer, Any Tax Officer, 1% Shareholder, Shareholder.
- **1120 LLC:** Managing Member

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1a Name shown on tax return. If a joint return, enter the name shown first.
ACME Supplies

1b **First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)**
12-3456789

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

2b **Second social security number or individual taxpayer identification number if joint tax return**

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
123 Factory Street City. State Zip

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5a 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.
c/o Tax Verification Services 30 Executive Park, Suite 200, Irvine

5b Customer file number (if applicable) (see instructions)

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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 / 2017 | 12 / 31 / 2016 | / / | / /

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, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, 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:** This form must be received by IRS within 120 days of the signature date.

☒ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a: (888)555-1234

Sign Here

▶ John Doe — **Signature** (see instructions) — Date: 09/26/2018

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

▶ **Spouse's signature** — Date: 09/26/2018

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Enter Employer Identification Number (EIN).

Enter exactly as printed.

Leave 5b blank.
(For third party use only)

Check either 6a, 6b, 6c.

Date may not look or be altered. Valid for 120 days.

Get Started Now!

Acceptable Business Titles

Forms Filed	Acceptable Titles

Form 1065, *US Return of Partnership Income*	• Signature of one of the following:
	  • Partner
	  • Limited Partner

Form 1120, *US Corporation Income Tax Returnor Form 1120S (small business), US Income Tax Returnforan "S" Corporation*	• Signature of one of the following:
	  • President
	  • Vice President
	  • Secretary
	  • Treasurer
	  • Assistant Treasurer
	  • 1% Shareholder (for Corporations)
	  • Shareholder (for S-Corporations)
	• Any Tax Officer, including:
	  • Controller
	  • CAO (Chief Accounting Officer)
	  • CEO (Chief Executive Officer)
	  • COO (Chief Operations Officer)
	  • CFO (Chief Financial Officer)

Form 1120 LLC, *USCorporationIncomeTaxReturn,or*
Form 1120 SLLC, *USIncomeTaxReturnforan"S" Corporation*
	• Signature of the Managing Member
	Exception: If a Form 8832, Entity Classification Election, has been filed then Signature can be:
	  • President
	  • VicePresident
	  • Secretary
	  • Treasurer

LLC is for a Multi Member Partnership	• Signature of one of the following:
	  • Partner
	  • Limited Partner

LLC is for a Multi Member Corporation	• Signature of one of the following:
	  • President
	  • Vice President
	  • Secretary
	  • Treasurer
	  • Assistant Treasurer
	  • Chief Accounting Officer

Still need help? Call our Customer Happiness Team at **800.969.5100**!

Acceptable Business Titles

Form 94 X series, Employment Tax Returns	• Signature is based on the actual Filing Requirement of the requestor (example: Filing Requirement is for Form 1120 you would use the 1120 signature requirements.)
Dissolved Corporations	• Signature of one of the following: • President • Vice President • Secretary • Treasurer
Form 1041, US Income Tax for Estates and Trusts For Estates:	• Signature of one of the following: • Executor/Executrix • Administrator/Personal Representative • Trustee • Heir at law • Next ofkin • Beneficiary
Form 1041, US Income Tax for Estates and Trusts For Trusts:	• Signature of one of the following: • Trustee • Beneficiary
Sole Proprietor	• Signature of one of the following: • Owner • Sole Proprietor
Form 1040, US Individual Income Tax Return	• Signature of one of the following: • Thetaxpayer (individual return) tax payer named one it her Line 1 or Line 2 of your request (join tre turn).
SSNW-2, Form 1099	• Signature of: • The tax payer who received the wages
EINW-2	• Signature of one of the following: • Officer of organization • Authorized delegate

Get Started Now!