



How to Guide: 4506-T for Individual & Corporate Returns

Note: The IRS requires that black ink be used when filling out the 4506-T.

Verify date
Only the July 2017 version is acceptable by the IRS.

Line 1a
Enter your name on line 1a. If you are ordering for a business, you will need a 4506-T filled out with the Business Name and address.

Lines 3-4
The IRS will only accept 2 addresses on the form. One on line 3, and one on line 4.

Line 5
Must have Data Facts' name and information on it. It is also acceptable to have Company Name, C/O Data Facts with our information.

Line 6
Enter only the return you are requesting on line 6.

Signature/Date
Must be on the form. Date is good for 120 days.

If you are ordering for a Business, the title of the borrower must be listed underneath the signature on the Title line.

Note: Ensure the attestation box above the signature is checked.

Form 4506-T <small>(July 2017) Department of the Treasury Internal Revenue Service</small>	Request for Transcript of Tax Return	<small>OMB No. 1545-1872</small>
<p>▶ Do not sign this form unless all applicable lines have been completed.</p> <p>▶ Request may be rejected if the form is incomplete or illegible.</p> <p>▶ For more information about Form 4506-T, visit www.irs.gov/form4506t.</p>		

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.	1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
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)

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

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.

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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. ▶

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.

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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.

Signature (see instructions)	Date	Phone number of taxpayer on line 1a or 2a
Title (if line 1a above is a corporation, partnership, estate, or trust)		
Spouse's signature	Date	

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form 4506-T (Rev. 7-2017)

Line 1b
Enter your SSN or if ordering for a business, enter your company's EIN number.

Lines 6-8
A box must be checked for the product you are ordering.

Line 9
Enter tax years requested. It is also acceptable to list all current years and we can circle the years you are requesting. If you are ordering for a business with "fiscal year" endings, you must use the specific date ending

Changes?
If changes are made to the form, the taxpayer **MUST** put their initials beside each change for the IRS to accept the form. If there are no initials beside the changes, the 4506-T will be rejected by the IRS.

Note
When using an electronically signed 4506-T, the IRS requires that the **ENTIRE** audit log be attached to the order. Data in the log should include: date, time of creation, IP address of the signer, document lifecycle notifications and result of each electronic signature in the document. The e-signed date **must** be visible.