



REQUEST FOR MORTGAGE ASSISTANCE

SLS Loan Number: _____

If you are experiencing a financial hardship and need help, you must complete and submit this form along with other required documentation to be considered. You must provide information about yourself and your intentions to either keep or transition out of your property; a description of the hardship that prevents you from paying your mortgage(s); information about all of your income, expenses and financial assets; whether you have declared bankruptcy; and information about the mortgage(s) on your principal residence and other single family real estate that you own. **When you sign and date this form, you will make important certifications, representations and agreements, including certifying that all of the information in this form is accurate and truthful.**

On this page, you must disclose information about your intentions to either keep or transition out of your home; Primary Borrower and Co-Borrower information; Bankruptcy, SCRA, and credit counseling agency information.

SECTION 1: PROPERTY INFORMATION	
My intent with the property is: <input type="checkbox"/> Keep the property <input type="checkbox"/> Sell the property <input type="checkbox"/> Deed the property back <input type="checkbox"/> Short payoff <input type="checkbox"/> I don't know	
NOTE: SLS will perform an evaluation to determine your eligibility for all available programs offered by your investor.	
The property is currently: <input type="checkbox"/> My primary residence <input type="checkbox"/> A second home <input type="checkbox"/> An investment property	
The property is currently: <input type="checkbox"/> Owner occupied <input type="checkbox"/> Renter occupied <input type="checkbox"/> Vacant	
Do you have a change in circumstance resulting from an increase or decrease in compensation? <input type="checkbox"/> No <input type="checkbox"/> Yes	

SECTION 2: BORROWER INFORMATION			
Primary Borrower		Co-Borrower	
Borrower's name		Co-Borrower's name	
Social security number	Date of birth / /	Social security number	Date of birth / /
Home phone number with area code		Home phone number with area code	
Cell or work number with area code		Cell or work number with area code	
Subject property address (Address requesting assistance for)		Subject property address (Address requesting assistance for)	
Primary residence address		Primary residence address	
Mailing address (If different than primary residence)		Mailing address (If different than primary residence)	
Employer name		Employer name	
Borrower hire date / /		Co-Borrower hire date / /	

SECTION 3: BANKRUPTCY, SCRA, AND CREDIT COUNSELING	
Has any Borrower filed for bankruptcy? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Chapter 7 <input type="checkbox"/> Chapter 11 <input type="checkbox"/> Chapter 12 <input type="checkbox"/> Chapter 13	Is any Borrower a Service member? <input type="checkbox"/> Yes <input type="checkbox"/> No Is any Borrower receiving hostile pay? <input type="checkbox"/> Yes <input type="checkbox"/> No Have you recently been deployed away from your principal residence or recently received a permanent change of station order? <input type="checkbox"/> Yes <input type="checkbox"/> No
Filing date: / / Case Number:	Is any borrower the surviving spouse of a deceased service member who was on active duty at the time of death? <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your bankruptcy been discharged? <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you contacted a credit counseling agency for help? <input type="checkbox"/> Yes <input type="checkbox"/> No
Counselors Name:	Counselors Phone Number: - -
Agency's Name:	Counselors Email Address:
Has the mortgage on your principal residence ever had a Home Affordable Modification Program (HAMP) trial period plan or other permanent modification? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Has any property that you or any Co-Borrower own had a permanent HAMP modification? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes", how many:	
Are you or any Co-Borrower currently in or being considered for a HAMP trial period plan on a property other than your principal residence? <input type="checkbox"/> Yes <input type="checkbox"/> No	



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On this page, you must disclose information about your income, expenses, and household assets. Non-Borrower contributors (Individuals who reside in the property and contribute to household expenses, but is not listed in the promissory note) need to list their income and sign the credit authorization at the bottom of this page.

SECTION 4: BORROWER, CO-BORROWER, AND NON-BORROWER INCOME, EXPENSES, AND DEBTS				
	Primary Borrower Income	Secondary Borrower Income	#1 Non-Borrower Contributor Income	#2 Non-Borrower Contributor Income
W2 employed	\$	\$	\$	\$
Self employed	\$	\$	\$	\$
Unemployed	\$	\$	\$	\$
Alimony *See notice below*	\$	\$	\$	\$
Child support *See notice below*	\$	\$	\$	\$
Death / Disability	\$	\$	\$	\$
Pension	\$	\$	\$	\$
Public Assistance	\$	\$	\$	\$
Veterans Administration / Active Duty	\$	\$	\$	\$
Rental property	\$	\$	\$	\$
Social Security (SSDI)	\$	\$	\$	\$
Other:	\$	\$	\$	\$
Total gross income	\$	\$	\$	\$

***Notice:** Alimony, Child support, or Separate maintenance income need not be revealed if you do not choose to have it be considered for repaying this loan*

Monthly Household Expenses							
Liabilities				Additional Living Costs			
1 st mortgage principal and interest (Subject property)	\$	Primary Residence Expense (If not subject)	\$	Medical	\$	Food	\$
2 nd mortgage principal and interest (Subject property)	\$	Alimony	\$	Tuition / School	\$	Utilities/Cable /Internet /Phone	\$
Property taxes	\$	Child support	\$	Car insurance	\$	Life Insurance	\$
HOA/Condo/Co-op fees	\$	Auto payments / Lease	\$	Auto Expenses	\$	Clothing	\$
Mortgage payments on other properties	\$	Credit Cards / Installment loans	\$	Dependent Expense	\$	Property maintenance	\$
Other Liabilities:			\$	Other Living:			\$
Total Expenses \$							

Non-Borrower Contributor Credit Authorization			
Individuals who Reside in the property and contribute to household expenses, but is not listed in promissory note			
I authorize Specialized Loan Servicing LLC, here out referred to as SLS, to obtain a consumer credit report. SLS will use the consumer credit report to confirm my residency address and determine whether my income is eligible to support a loan modification. Upon request, SLS will provide me with the name and address of the Consumer Reporting Agency contacted to supply the report. I understand that credit inquiries have the potential to impact my credit score.			
#1 Non-Borrower Contributor Signature:	Date: / /	#2 Non-Borrower Contributor Signature:	Date: / /
Printed Name		Printed Name	
Social security number:		Social security number:	



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This page lists the required income documentation that you must submit with this form in support of your request for assistance. Additionally, you must disclose ownership in any other properties owned by the Borrower and Co-Borrower.

SECTION 5: REQUIRED INCOME DOCUMENTATION	
Provide for each Borrower as applicable	
Core documents (All income types)	<ul style="list-style-type: none"> Completed, signed and dated Request for Mortgage Assistance form Signed and dated 4506-T or most recent, signed, and complete tax returns Last 2 months' worth of bank statements
Salary or hourly wage	<ul style="list-style-type: none"> 30 days' or 4 weeks' worth of consecutive paystubs with year to date income.
Self-employed income	<ul style="list-style-type: none"> Most recent, signed, and dated quarterly (at least 3 months) or YTD profit and loss Business Tax Returns with all schedules
Rental income	<ul style="list-style-type: none"> Mortgage statement for rental property and primary residence Lease agreement for rental property 2 most recent Bank statements with rental income identified Most recent, signed, and complete individual Tax return with Schedule E
Benefit income	<ul style="list-style-type: none"> Award letter 2 most recent Bank statements with benefit income identified
Alimony or child support <i>*See notice below*</i>	<ul style="list-style-type: none"> Divorce decree Bank statement with alimony / child support income identified
Unemployment income	<ul style="list-style-type: none"> Unemployment benefits statement
Other income	<ul style="list-style-type: none"> Award letter / Statement of income 2 most recent Bank statements with "other" income identified

***Notice:** Alimony, Child support, or Separate maintenance income need not be revealed if you do not choose to have it be considered for repaying this loan*

SECTION 6: OTHER PROPERTIES OWNED							
Property Address (Enter "V" for vacant, "S" for second home, "R" for rented, or "P" for primary)	Property is: (V,S,R, or P)	Gross monthly rent:	Monthly mortgage payment:	Insurance, taxes, misc.	HOA:	Net rental income	Loan Servicer's name
		\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	
	Totals	\$	\$	\$	\$	\$	



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This page lists the hardship affidavit which outlines the reason for your financial situation and the supporting documentation that is required to be submitted with this form.

SECTION 7: HARDSHIP AFFIDAVIT	
Date Hardship Began: _____	
I believe my situation is:	
<input type="checkbox"/> Short term (under 6 months) <input type="checkbox"/> Medium term (6-12 months) <input type="checkbox"/> Long term (Greater than 12 months)	
If your hardship is:	Then the required hardship documentation is:
<input type="checkbox"/> Unemployment	<ul style="list-style-type: none"> No Hardship Documentation Required.
<input type="checkbox"/> Reduction in income	
<input type="checkbox"/> Increase in housing expense	
<input type="checkbox"/> Divorce or legal separation	<ul style="list-style-type: none"> Divorce Decree filed by the court; OR Separation agreement signed by the court; OR Current credit reporting evidencing divorce or separation; OR Recorded quitclaim deed evidencing that non- occupying Borrower has surrendered rights to property.
<input type="checkbox"/> Death of a Borrower or death of either the primary or secondary wage earner in the household	<ul style="list-style-type: none"> Death certificate; OR Obituary or newspaper article reporting the death. Documentation identifying the executor of the Estate
<input type="checkbox"/> Long-Term or permanent disability; serious illness of a Borrower/Co-Borrower or dependent family member	<ul style="list-style-type: none"> Proof of monthly insurance benefits or government assistance; OR Written statement or other documentation verifying disability or illness; OR Doctor's certificate of illness or disability; OR Medical bills. <p>*None of the above shall require providing detailed medical information.</p>
<input type="checkbox"/> Disaster (natural or man-made) adversely impacting the property or Borrower's place of employment	<ul style="list-style-type: none"> Insurance claim; OR Federal Emergency Management Agency grant or Small Business Administration loan; OR Borrower or Employer Property located in a federally declared disaster area.
<input type="checkbox"/> Distant employment transfer/relocation	<p>For active duty service members:</p> <ul style="list-style-type: none"> Notice of permanent change of station (PCS) or actual PCS orders. <p>For employment transfers / new employment:</p> <ul style="list-style-type: none"> Copy of signed offer letter or notice from employer showing transfer of new employment location; OR Pay stub from new employer <p>*In addition to the above, documentation on the amount of relocation assistance (not applicable to active military).</p>
<input type="checkbox"/> Business Failure	<ul style="list-style-type: none"> Tax return the previous year (signed with all schedules); AND Proof of business failure supported by one of the following: <ul style="list-style-type: none"> Bankruptcy Filing for business; OR Two months of recent bank statements for the business account evidencing cessation of business activity; OR Most recent signed and dated quarterly or year-to-date profit and loss statement
Other: a hardship not covered above Please list hardship reason:	<ul style="list-style-type: none"> Written and signed explanation detailing the hardship with supporting documentation.



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On this page, all Borrowers and Co-Borrowers (listed in the promissory note) who are in this form need to review and sign the Borrower and Co-Borrower acknowledgment agreement.

SECTION 8: BORROWER AND CO-BORROWER ACKNOWLEDGMENT AGREEMENT

I certify, acknowledge, and agree to the following:

1. I certify that all of the information in this Request for Mortgage Assistance is truthful and the hardship that I have identified contributed to my need for mortgage relief.
2. I understand and acknowledge the accuracy of my statements may be reviewed by the servicer, owner or guarantor of my mortgage, their agent(s), or an authorized third party, and I may be required to provide additional supporting documentation. I will provide all requested documents and will respond timely to all servicer, or authorized third party, communications.
3. I understand and acknowledge that knowingly submitting false information may violate Federal and other applicable law.
4. I understand and acknowledge if I have intentionally defaulted on my existing mortgage, engaged in fraud or misrepresented any fact(s) in connection with this request for mortgage relief or if I do not provide all required documentation, the servicer may cancel any mortgage relief granted and may pursue foreclosure on my home and/or pursue any available legal remedies.
5. I understand and acknowledge that the servicer is not obligated to offer me assistance based solely on the representations in this document or other documentation submitted in connection with my request.
6. I understand and acknowledge that I may be eligible for a trial period plan, repayment plan, or forbearance plan. If I am eligible for one of these plans,
 - a. I agree that all the terms of this Acknowledgment and Agreement are incorporated into such plan by reference as if set forth in such plan in full.
 - b. I agree that my first timely payment under the plan will serve as acceptance of the terms set forth in the notice of the plan sent by the servicer.
 - c. I agree that the servicer's acceptance of any payments under the plan will not be a waiver of any acceleration of my loan or foreclosure action that has occurred and will not cure my default unless such payments are sufficient to completely cure my entire default under my loan.
 - d. I agree that payments due under a trial period plan for a modification will contain escrow amounts. If I was not previously required to pay escrow amounts, and my trial period plan contains escrow amounts, I agree to the establishment of an escrow account and agree that any prior waiver is revoked. Payments due under a repayment plan or forbearance plan may or may not contain escrow amounts. If I was not previously required to pay escrow amounts and my repayment plan or forbearance plan contains escrow amounts, I agree to the establishment of an escrow account and agree that any prior escrow waiver is revoked.
7. I certify that a condemnation notice has not been issued for the property.
8. I authorize the servicer or authorized third party will obtain a current credit report on all borrowers obligated on the Note.
9. I understand and acknowledge that the servicer or authorized third party will collect and record personal information that I submit in this Borrower Response Package and during the evaluation process. This personal information may include, but is not limited to: my name, address, telephone number, my Social Security number, my credit score, my income, and my payment history and information about my account balances and activity. I understand and consent to the servicer or authorized third party, as well as any investor or guarantor disclosing my personal information and the terms of any relief or foreclosure alternative that I receive to the following:
 - a. Any investor, insurer, guarantor, or servicer that owns, insures, guarantees, or services my first lien or subordinate lien (if applicable) mortgage loan(s) or any companies that perform support services to them
10. I consent to being contacted concerning this request for mortgage assistance and all other matters concerning my loan at any e-mail address or cellular or mobile telephone number I have provided to the Servicer, whether provided in this Request for Mortgage Assistance or provided previously to the Servicer in relation to my loan account, or that I may provide to the Servicer during or after the loss mitigation evaluation process, in relation to my loan. This includes manual or auto-dialed text messages and telephone calls (including those made by an automated dialer) to my cellular or mobile telephone.

Borrower Signature:	Date:	Co-Borrower Signature:	Date:
	/ /		/ /

BORROWER <input type="checkbox"/> I do not wish to furnish this information Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White Sex: <input type="checkbox"/> Female <input type="checkbox"/> Male	CO-BORROWER <input type="checkbox"/> I do not wish to furnish this information Ethnicity: <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino Race: <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White Sex: <input type="checkbox"/> Female <input type="checkbox"/> Male
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Request for Transcript of Tax Return

a Do not sign this form unless all applicable lines have been completed.
a Request may be rejected if the form is incomplete or illegible.
a 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.	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.

Specialized Loan Servicing LLC - Attn: Resolution Support - 1-800-306-6062 - 8742 Lucent Blvd., Suite 300, Highlands Ranch, CO 80129 - Fax: 877-875-0981

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

- 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.

 | / / | / / | / / | / / |

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:** For transcripts being sent to a third party, this form must be received 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

Sign Here

Signature (see instructions)	Date
Title (if line 1a above is a corporation, partnership, estate, or trust)	
Spouse's signature	Date

Section references are to the Internal Revenue Code unless otherwise noted.

Future Developments

For the latest information about Form 4506-T and its instructions, go to www.irs.gov/form4506t. Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

General Instructions

Caution: Do not sign this form unless all applicable lines have been completed.

Purpose of form. Use Form 4506-T to request tax return information. You can also designate (on line 5) a third party to receive the information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

Note: If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

Tip. Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

Automated transcript request. 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.

Where to file. Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:

Mail or fax to:

Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team Stop 6716AUSC Austin, TX 73301
Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	Internal Revenue Service RAIVS Team Stop 37106 Fresno, CA 93888
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	Internal Revenue Service RAIVS Team Stop 6705 P-6 Kansas City, MO 64999
	816-292-6102

Chart for all other transcripts

If you lived in or your business was in:

Mail or fax to:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin	Internal Revenue Service RAIVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250
	859-669-3592

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, include it on this line.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note: If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party — Business.

Line 6. Enter only one tax form number per request.

Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.

CAUTION You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester's right to receive the information.

Partnerships. Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Note: If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign Form 4506-T for a taxpayer only if the taxpayer has specifically delegated this authority to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4506-T.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form, 10 min.;** **Preparing the form, 12 min.;** and **Copying, assembling, and sending the form to the IRS, 20 min.**

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service
Tax Forms and Publications Division
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.