

Instructions for Completing the IRS Tax Authorization Form 4506-T

SBA requires you to complete the IRS Form 4506-T as a part of your disaster loan application submission. The form authorizes the IRS to provide federal income tax information directly to SBA. Although the form is available online, it cannot be transmitted electronically.

The IRS Form 4506-T must be completed and submitted with each SBA disaster loan application, even if you are not required to file a federal income tax return.

A separate IRS Form 4506-T must be returned with the SBA disaster loan application for:

- (1) each disaster loan applicant (individuals filing joint returns may use a single IRS Form 4506-T),
- (2) each corporation or partnership in which the disaster loan applicant holds a 50% or greater interest,
- (3) each individual or entity which holds a 20% or greater interest in the disaster loan applicant,
- (4) each general partner, and
- (5) each affiliate business.

Where To Send Form 4506-T (Include your full name and your Application Reference # on all correspondence submitted to the SBA.)

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| <p>Mail your completed document(s) to:</p> | <p>U.S. Small Business Administration Processing & Disbursement Center Attn: ELA Mail Department P.O. Box 156119 Fort Worth, TX 76155</p> |
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● Fill in section 1-4, 6, 6c, 9, Signature, Date and Title

- Enter the name of the individual taxpayer, or business (whichever is applicable) that was used to file the tax return in section 1a. If you file a joint tax return, include the name of the joint filer that was used to file the tax return on line 2a.
- Next, enter the taxpayer identification number, i.e. Social Security number (SSN) in section 1b. If you file a joint tax return, include the SSN for the second filer in section 2b.
- If the authorization is for a business, enter the Employer Identification Number (EIN) in section 1b.
- Enter your current address in section 3. If name is different now than on the transcript being requested, enter the current name as well.
- Enter your previous address in section 4 only if different than the current address in section 3.
- Enter the tax transcript you filed in section 6. If this request is for an individual, enter 1040. If this request is for a business, please enter the business tax return you filed for the year (not quarterly returns). Examples might be 1065, 1120, 990, 1041, etc.
- Check the box for 6c only.
- If the authorization is for an individual, include the 2 most recent years a tax return was filed. If the authorization is for a business, include the most recent 3 years a tax return was filed, including the end of the fiscal year of the business. Format is MM/DD/YYYY for all authorizations.
- Enter the telephone number of the first, or second filer in the signature area.
- If you filed a joint tax return, only one filer is required to sign.
- Signer Title: If the authorization is for a business, the signer must be authorized to request the tax transcript. Examples of authorized representatives of a business might be President, Secretary, Treasurer, Vice President, Chief Executive Officer, Chief Financial Officer, Owner, Managing Partner, General Partner, Limited Partner, Partner, Managing Member, or Trustee.

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| Form 4506-T <small>(Rev. August 2014) Department of the Treasury Internal Revenue Service</small> | Disaster Request for Transcript of Tax Return ▶ 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 |
| <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 Transcript of Your Tax Records" 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.</p> | | |
| <p>1a Name shown on tax return. If a joint return, enter the name shown first.</p> | <p>1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)</p> | |
| <p>2a If a joint return, enter spouse's name shown on tax return.</p> | <p>2b Second social security number or individual taxpayer identification number if joint tax return</p> | |
| <p>3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)</p> | | |
| <p>4 Previous address shown on the last return filed if different from line 3 (see instructions)</p> | | |
| <p>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.</p> | | |
| <p>U.S. Small Business Administration Office of Disaster Assistance</p> | | |
| <p>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.</p> | | |
| <p>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.</p> | | |
| <p>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. <input type="checkbox"/></p> | | |
| <p>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. <input type="checkbox"/></p> | | |
| <p>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. <input checked="" type="checkbox"/></p> | | |
| <p>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. <input type="checkbox"/></p> | | |
| <p>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. <input type="checkbox"/></p> | | |
| <p>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.</p> | | |
| <p>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.</p> | | |
| <p>Caution. Do not sign this form unless all applicable lines have been completed.</p> | | |
| <p>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, 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.</p> | | |
| <p>Sign Here</p> | <p>Signature (see instructions) _____ Date _____</p> <p>Title (if line 1a above is a corporation, partnership, estate, or trust) _____</p> <p>Spouse's signature _____ Date _____</p> | |
| <p>Phone number of taxpayer on line 1a or 2a _____</p> | | |
| <p>For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form 4506-T (Rev. 8-2014)</p> | | |