

SBA Request for Copy or Transcript of Tax Form



Read instructions before completing this form.

Type or print clearly. Request may be rejected if the form is incomplete or illegible.

US Small Business Admin.
 OMB No. 1545-0429

Note: Do not use this form to get tax account information. Instead, see instructions below.

1a Name shown on tax form. If a joint return, enter the name shown first.	1b First social security number on tax form or employer identification number (see instructions.)
2a If a joint return, spouse's name shown on tax form	2b Second social security number on tax form
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code	
4 Address, (including apt., room, or suite no.), city, state, and ZIP code shown on the last return filed if different from line 3	
5 If copy of form or a tax return transcript is to be mailed to someone else, enter the third party's name and address	
6 If we cannot find a record of your tax form and you want the payment refunded to the third party, check here <input type="checkbox"/>	
7 If name in third party's records differs from line 1a above, enter that name here (see instructions)	
8 Check only one box to show what you want. There is no charge for items 8a, b, and c:	
a <input type="checkbox"/> Tax return transcript of Form 1040 series filed during the current calendar year and the 3 prior calendar years. (see instructions).	
b <input type="checkbox"/> Verification of nonfiling.	
c <input type="checkbox"/> Form(s) W-2 information (see instructions).	
d <input type="checkbox"/> Copy of tax form and all attachments (Including Form(s) W-2, schedules, or other forms). The charge is \$23 for each period requested. <i>Note: If these copies must be certified for court or administrative proceedings, see instructions and check here</i> <input type="checkbox"/>	
9 If this request is to meet a requirement of one of the following, check all boxes that apply.	
<input type="checkbox"/> Small Business Administration <input type="checkbox"/> Department of Education <input type="checkbox"/> Department of Veterans Affairs <input type="checkbox"/> Financial Institution	
10 Tax form number (Form 1040, 1040A, 941, etc.)	12 Complete only if line 8d is checked. Amount Due: a Cost for each period b Number of tax periods requested on line 11 c Total cost. Multiply line 12a by line 12b <i>Full payment must accompany your request. Make check or money order payable to "Internal Revenue Service"</i>
11 Tax period(s) (year or period ended date). If more than four, see instructions.	Does not apply to SBA transcript requests

Caution: Before signing, make sure all items are complete and the form is dated.

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. I am aware that based upon this form, the IRS will release the tax information requested to any party shown on line 5. The IRS has no control over what that party does with the information.

Signature. See instructions. If other than taxpayer, attach authorization document.	Date	Telephone number of requester
Title (if line 1a above is a corporation, partnership, estate, or trust)	Date	Best time to call
Spouse's signature	Date	TRY A TAX RETURN TRANSCRIPT (see line 8A instructions)

Instructions

Section references are to the Internal Revenue Code.

TIP: If you had your tax form filled in by a paid preparer, check first to see if you can get a copy from the preparer. This may save you both time and money.

Purpose of Form. — Use Form 4506 to get a tax return transcript, verification that you did not file a Federal tax return, Form W-2 information, or a copy of a tax form. Allow 6 weeks after you file a tax form before you request a copy of it or a transcript. For W-2

information, wait 13 months after the end of the year in which the wages were earned. For example, wait until Feb. 1999 to request W-2 information for wages earned in 1997.

Do not use this form to request Forms 1099 or tax account information. See this page for details on how to get these items. *Note: Form 4506 must be received by the IRS within 60 calendar days after the date you signed and dated the request.*

How Long Will it Take? — You can get a tax return transcript or verification of nonfiling within 7 to 10 workdays after the IRS receives your request. It can take up to 60 calendar

days to get a copy of a tax form or W-2 information. To avoid any delay, be sure to furnish all the information asked for on Form 4506.

Forms 1099. — If you need a copy of a Form 1099, contact the payer. If the payer cannot help you, call or visit the IRS to get Form 1099 information.

Tax Account Information. — If you need a statement of your tax account showing any later changes that you or the IRS made to the original return, request tax account information. Tax account information lists

(Continued on page 2)