



UNIFORM BORROWER ASSISTANCE FORM

If you are experiencing a temporary or long-term hardship and need help, you must complete and submit this form along with other required documentation to be considered for available options. On this page, you must disclose information about (1) your intentions to either keep or transition out of your home; (2) the property status; (3) real estate taxes; (4) homeowner's insurance premiums; (5) bankruptcy; (6) your credit counseling agency, and (7) other liens, if any, on your property.

On Page 2 you must disclose information about **all** of your income, expenses and assets. On Pages 2 & 3, you must complete the Hardship Affidavit in which you disclose the nature of your hardship. The Hardship Affidavit informs you of the required documentation that you must submit in support of your hardship claim. Pages 4 & 5 provide a checklist of required documentation based on whether you would like to retain ownership of your property or other loss mitigation options.

NOTICE: In addition, when you sign and date this form, you will make important certifications, representation and agreements, including certifying that all of the information in this Uniform Borrower Assistance Form is accurate and truthful, and an identified hardship has contributed to your submission of this request for relief or assistance.

REMINDER: The Borrower Assistance Package you need to return consists of: (1) the completed, signed and dated Uniformed Borrower Assistance Form; (2) completed and signed IRS Form 4506T ; (3) required income documentation, and (4) required hardship documentation.

For your protection, please do not submit account numbers, social security number, balances or other confidential information through a non-secure email service.

Loan I.D. Number _____ (usually found on your monthly mortgage statement)

I want to:	<input type="checkbox"/> Keep the Property	<input type="checkbox"/> Sell the Property	<input type="checkbox"/> Deed the property to the lender
The property is my:	<input type="checkbox"/> My Primary Residence	<input type="checkbox"/> A Second Home	<input type="checkbox"/> An Investment Property
The property is:	<input type="checkbox"/> Owner Occupied	<input type="checkbox"/> Renter Occupied	<input type="checkbox"/> Vacant

If this is a request for joint assistance, Borrower and Co-Borrower each agree that we intend to request assistance jointly. (sign below)

BORROWER: _____ CO-BORROWER: _____

BORROWER		CO-BORROWER	
BORROWER'S NAME:		CO-BORROWER'S NAME:	
SOCIAL SECURITY NUMBER:	DATE OF BIRTH:	SOCIAL SECURITY NUMBER:	DATE OF BIRTH:
HOME/CELL PHONE NUMBER WITH AREA CODE FIRST:		HOME / CELL PHONE NUMBER WITH AREA CODE FIRST:	
MAILING ADDRESS:			
PROPERTY ADDRESS (IF SAME AS MAILING , JUST WRITE SAME):		EMAIL ADDRESS:	

Is the property listed for sale? ☐ Yes ☐ No
Have you received an offer on the property? ☐ Yes ☐ No
Date of Offer _____
Expiration Date of Offer _____
Amount of Offer \$ _____
Agent's Name: _____
Agent's Phone Number: _____

Have you contacted a credit-counseling agency for help? ☐ Yes ☐ No
If yes, please complete the following:
Counselor's Name: _____
Agency Name: _____
Counselor's Phone Number: _____
Counselor's E-Mail: _____

Who pays the real estate tax bill on your property?
☐ I Do ☐ Lender Does ☐ Paid by Condo or HOA
Are the taxes current? ☐ Yes ☐ No
Condominium or HOA Fees? ☐ Yes ☐ No \$ _____
Paid To: _____

Who pays the hazard insurance premium on your property?
☐ I Do ☐ Lender Does ☐ Paid by Condo or HOA
Is the policy current? ☐ Yes ☐ No
Name of Insurance Co: _____
Insurance Co Tel #: _____

Have you filed for bankruptcy? ☐ Yes ☐ No
If Yes: ☐ Chapter 7 ☐ Chapter 13
Has your bankruptcy been discharged? ☐ Yes ☐ No
Did you reaffirm the mortgage in the bankruptcy? ☐ Yes ☐ No
Was it Approved by the bankruptcy court? ☐ Yes ☐ No

Filing Date: _____
Bankruptcy Case Number: _____
Date of reaffirmation: _____

ADDITIONAL LIENS/MORTGAGES OR JUDGMENTS ON THIS PROPERTY:			
Lien Holder's Name	Balance	Interest Rate	Loan Number

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Monthly Household Income		Monthly Household Expenses/Debt	
Monthly Gross Wages	\$	First Mortgage Payment	\$
Overtime	\$	Second Mortgage Payment	\$
Child Support/ Alimony*	\$	Homeowner's Insurance	\$
Non-Taxable Social Security/ SSDI	\$	Property Taxes	\$
Taxable SS benefits or other monthly income from annuities or retirement plans	\$	Credit Cards/ Installment Loan(s) (total minimum payment per month)	\$
Tips, Commissions, Bonus and Self-Employed Income	\$	Alimony, child support payments	\$
Rents Received	\$	Auto Payments	\$
Unemployment Income	\$	HOA/Condo Fees/ Property Maintenance	\$
Food Stamps/ Welfare	\$	Mortgage Payments on other properties	\$
Other _____	\$	Other _____	\$
Total (Gross Income)	\$	Total Debt/Expenses	\$

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

Assets		Liabilities	
Checking Account(s)	\$	Notes Payable To Banks-Secured	\$
Savings/ Money Market / CDs	\$	Notes Payable to Banks-Unsecured	\$
Stocks/ Bonds	\$	Accounts Payable To Others	\$
Other Cash on Hand	\$	Unpaid Income Tax	\$
Cash Value – Life Insurance	\$	Other Unpaid Taxes	\$
Automobiles and other personal property		Real Estate Mortgages Payable (See Schedule	\$
Real Estate Owned (See Schedule A Below)	\$	Other Debts- Itemize	\$
Other Assets- Itemize	\$	Other Debts- Itemize	\$
Other Assets- Itemize	\$	Total Liabilities:	\$
	\$	Net Worth:	\$
Total Assets	\$	Total Liabilities and Net Worth:	\$

Schedule A- Real Estate Owned

- Use the back of the form if more space is needed-

Address and Type of Property	Title in Name Of	Date	Cost	Market Value	Mortgage Holder	Mortgage Amount

HARDSHIP AFFIDAVIT

(provide a written explanation with this request describing the specific nature of your hardship)

I am requesting a review of my current financial situation to determine whether I qualify for temporary or permanent assistance.

Date Hardship Began is: _____

I believe that my situation is:

- ☐ Short-Term (under 6 months)
☐ Medium-Term (6-12 months)
☐ Long-Term or Permanent Hardship (greater than 12 months)

I am having difficulty making my monthly payments because of reasons set forth below:
 (Please check all that apply and submit required documentation demonstrating your hardship)

If Your Hardship is:	Then the Required Hardship Documentation is:
<input type="checkbox"/> Unemployment	<input type="checkbox"/> No hardship documentation required
<input type="checkbox"/> Underemployment	<input type="checkbox"/> No hardship documentation required, as long as you have submitted the income documentation that supports the income described in the Required Income Documentation section on Page 2
<input type="checkbox"/> Income reduction (e.g., elimination of overtime, reduction in regular working hours, or a reduction in base pay)	<input type="checkbox"/> No hardship documentation required, as long as you have submitted the income documentation that supports the income described in the Required Income Documentation section on Page 2
<input type="checkbox"/> Divorce or legal separation, Separation of Borrowers unrelated by marriage, civil union or similar domestic partnership under applicable law	<input type="checkbox"/> Divorce decree signed by the court, OR <input type="checkbox"/> Separation agreement signed by the court; OR <input type="checkbox"/> Recorded Quitclaim Deed evidencing that the non-occupying Borrower or Co-borrower has relinquished all rights to the property
<input type="checkbox"/> Death of a borrower or death of either the primary or	<input type="checkbox"/> Death Certificate

secondary wage earner in the household	
<input type="checkbox"/> Long-term or permanent disability; Serious illness or borrower/co-borrower or dependent family member	<input type="checkbox"/> Doctor's certificate of illness or disability; OR <input type="checkbox"/> Medical bills; OR <input type="checkbox"/> Proof of monthly insurance benefits or government assistance (if applicable)
<input type="checkbox"/> Disaster adversely impacting the property of Borrower's place of employment	<input type="checkbox"/> Insurance claim; OR <input type="checkbox"/> Federal Emergency Management Agency grant or Small Business Administration loan; OR <input type="checkbox"/> Borrower or Employer property located in a federally declared disaster area
<input type="checkbox"/> Distant employment transfer	<input type="checkbox"/> No Hardship documentation required
<input type="checkbox"/> Business Failure	<input type="checkbox"/> Tax Return from previous year (including all schedules) AND <input type="checkbox"/> Proof of business failure supported by one of the following: <ul style="list-style-type: none"> • Bankruptcy filing for the business; OR • Two months recent bank statements for the business account evidencing cessation of business activity; OR • Most recent signed and dated quarterly or year-to-date statement profit and loss statement
<input type="checkbox"/> Other	Explain:

Provide a Written Explanation describing the specific nature of your hardship below

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Required Documents Checklist

Please check the box below if you are interested in a Modification, Short Sale or Deed-in-Lieu of Foreclosure:

Modification

Permanently modifies your mortgage so that your payments or terms are more manageable as a permanent solution to a long-term or permanent hardship.

- ☐ Yes, evaluate me for a modification

Required Documents For Evaluation

- ☐ Completed & Signed IRS Form 4506T (included in this package)
- ☐ Current pay stubs for 30 days that includes a YTD figure
- ☐ Previous year W-2
- ☐ If Federal Income Tax has not been filed for the current year, provide proof of an extension
- ☐ Signed & Dated Tax Returns for the last 2 years (including all schedules)
- ☐ Signed & Dated Business Returns for the last 2 years (*if self employed*)
- ☐ P& L Statement to include total income, less total expenses, resulting in a net gain or net less (*if self employed*)
- ☐ Bank Statements (3 months, *if self employed personal & business statements*)
- ☐ Copy of current utility bill (if property is owner occupied)
- ☐ Proof of HOA Dues (if applicable)

☐ Do you have any additional sources of income? Provide for each borrower as applicable

"Other Earned Income" such as bonuses, commissions, housing allowance, tips, or overtime:

- ☐ Reliable third-party documentation describing the amounts and nature of the income (e.g., employment contract or printouts documenting tip income).

Social Security, disability, or death benefits, pension, public assistance, or adoption assistance:

- ☐ Documentation showing the amount and frequency of the benefits, such as letters, exhibits, disability policy or benefits statements from the provider, and
- ☐ Documentation showing the receipt of payment, such as copies of the three most recent bank statements showing deposits

Rental Income:

- ☐ Copy of the most recent filed federal tax return with all schedules, including Schedule E- Supplement Income and Loss
- ☐ Rental Income Worksheet
- ☐ Copy of the current lease agreements with either bank statements demonstrating receipt of rent

Investment Income:

- ☐ Copies of the two most recent investment statements or bank statements supporting receipt of this income.

Alimony, child support, or separation maintenance payments as qualifying income*

- ☐ Copy of the divorce decree separation agreement, or other written legal agreement filed with the court, or a court decree that states the amount of alimony, child support, or separation maintenance payments and the period of time over which the payment will be received, and
- ☐ Copies of your 3 most recent bank statement or third-party documents showing receipt of payment

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

Short Sale

A short sale, also known as a pre-foreclosure sale, is the sale of a property for less than the balance remaining on the mortgage loan secured by the property. With a short sale, the mortgage lender agrees to release its mortgage lien on the property when it receives the proceeds of the sale of the property, even though the proceeds are less than the mortgage loan balance. Your benefit is avoiding foreclosure. **The lender may accept the sales proceeds in full or only partial satisfaction of the loan balance potentially resulting in your liability for the difference between the balance remaining on the mortgage loan and the sales proceeds paid to the mortgage lender. This alternative may or may not result in a reduction or forgiveness of the remaining loan balance.**

- ☐ Yes, I am interested in a Short Sale.

Required Documents For Evaluation

- ☐ Completed & Signed IRS Form 4506T, Authorization to Release Information, & Arm's Length Transaction form (included in this package)
- ☐ Current pay stubs for 30 days that includes a YTD figure
- ☐ Previous year W-2
- ☐ If Federal Income Tax has not been filed for the current year, provide proof of an extension
- ☐ Signed & Dated Tax Returns for the last 2 years (including all schedules)
- ☐ Signed & Dated Business Returns for the last 2 years (*if self employed*)
- ☐ P& L Statement to include total income, less total expenses, resulting in a net gain or net less (*if self employed*)
- ☐ Bank Statements (3 months, *if self employed personal & business statements*)
- ☐ Executed Sales Contract (signed & dated)
- ☐ Listing Agreement (signed & dated)
- ☐ Copy of MLS
- ☐ HUD

Do you have any additional sources of income? Provide for each borrower as applicable

“Other Earned Income” such as bonuses, commissions, housing allowance, tips, or overtime:

- ☐ Reliable third-party documentation describing the amounts and nature of the income (e.g., employment contract or printouts documenting tip income).

Social Security, disability, or death benefits, pension, public assistance, or adoption assistance:

- ☐ Documentation showing the amount and frequency of the benefits, such as letters, exhibits, disability policy or benefits statements from the provider, and
- ☐ Documentation showing the receipt of payment, such as copies of the three most recent bank statements showing deposits

Rental Income:

- ☐ Copy of the most recent filed federal tax return with all schedules, including Schedule E- Supplement Income and Loss
- ☐ Rental Income Worksheet
- ☐ Copy of the current lease agreements with either bank statements demonstrating receipt of rent

Investment Income:

- ☐ Copies of the two most recent investment statements or bank statements supporting receipt of this income.

Alimony, child support, or separation maintenance payments as qualifying income*

- ☐ Copy of the divorce decree separation agreement, or other written legal agreement filed with the court, or a court decree that states the amount of alimony, child support, or separation maintenance payments and the period of time over which the payment will be received, and
- ☐ Copies of your 3 most recent bank statement or third-party documents showing receipt of payment

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

Deed-in-Lieu of Foreclosure (DIL)

With a Deed-in-Lieu, you voluntarily transfer ownership of your property to your mortgage lender and avoid a foreclosure. **This alternative may or may not result in a reduction or forgiveness of the remaining loan balance potentially resulting in your liability for the difference between the balance remaining on the mortgage loan and the appraised value of the property deeded to the mortgage lender. The lender may accept the DIL in full or partial satisfaction of the loan balance. This alternative may or may not result in a reduction or forgiveness of the remaining loan balance.**

- ☐ Yes, I am interested in a Deed-in-Lieu of Foreclosure (DIL)

Required Documents For Evaluation

- ☐ Completed & Signed IRS Form 4506T (included in this package)
- ☐ Current Pay Stubs for two pay periods that including a YTD figure
- ☐ If Federal Income Tax has not been filed for the current year, provide copy of W-2's and 1099(s).
- ☐ Signed & Dated Tax Returns for the last 2 years (including all schedules)
- ☐ Bank Statements (3 months, *if self employed personal & business statements*)
- ☐ Signed & Dated Business Returns for the last 2 years (*if self employed*)
- ☐ P& L Statement and Balance Sheet (*if self employed*)

Do you have any additional sources of income? Provide for each borrower as applicable

“Other Earned Income” such as bonuses, commissions, housing allowance, tips, or overtime:

- ☐ Reliable third-party documentation describing the amounts and nature of the income (e.g., employment contract or printouts documenting tip income).

Social Security, disability, or death benefits, pension, public assistance, or adoption assistance:

- ☐ Documentation showing the amount and frequency of the benefits, such as letters, exhibits, disability policy or benefits statements from the provider, and
- ☐ Documentation showing the receipt of payment, such as copies of the three most recent bank statements showing deposits

Rental Income:

- ☐ Copy of the most recent filed federal tax return with all schedules, including Schedule E- Supplement Income and Loss
- ☐ Rental Income Worksheet
- ☐ Copy of the current lease agreements with either bank statements demonstrating receipt of rent

Investment Income:

- ☐ Copies of the two most recent investment statements or bank statements supporting receipt of this income.

Alimony, child support, or separation maintenance payments as qualifying income*

- ☐ Copy of the divorce decree separation agreement, or other written legal agreement filed with the court, or a court decree that states the amount of alimony, child support, or separation maintenance payments and the period of time over which the payment will be received, and
- ☐ Copies of your 3 most recent bank statement or third-party documents showing receipt of payment

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

Borrower/ Co-Borrower Acknowledgment and Agreement

1. I certify that all of the information in this Borrower Assistance Form/Package is truthful and the hardship(s) identified above have contributed to submission of this request for mortgage relief
2. I understand and acknowledge that the Servicer, owner or guarantor of my mortgage, or their agent(s) may investigate the accuracy of my statements, may require me to provide additional supporting documentation, and that knowingly submitting false information may violate Federal and other applicable law.
3. I understand the Servicer, owner or guarantor of my mortgage will obtain a current credit report on all borrowers obligated on the Note.
4. I understand that 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, owner or guarantor of my mortgage may cancel any mortgage relief granted and may pursue foreclosure on my home and/or pursue any available legal remedies including collection of the balance of the loan remaining for which I may be personally liable in the event of fraud or misrepresentation.
5. I certify that my property has not received a condemnation notice.
6. I certify that I am willing to provide all requested documents and to respond to all Servicer, owner or guarantor of my mortgage communications in a timely manner. I understand that time is of the essence.
7. I understand that the Servicer, owner or guarantor of my mortgage will use this information to evaluate my eligibility for available relief options and foreclosure alternatives, but that the Servicer, owner or guarantor of my mortgage is not obligated to offer me assistance base solely on the representations in this document or other documentation submitted in connection with my request.
8. If I am eligible for a mortgage modification or repayment plan and I accept and agree to all to the terms, I also agree that this Acknowledgement and Agreement are incorporated into such of such plan by reference as if set forth in such plan in full. My first timely payment following my Servicer, owner or guarantor of my mortgage's determination will serve as acceptance of the terms set forth in the notice sent to me that sets forth the terms and conditions of the mortgage modification or repayment plan.
9. I agree that when the Servicer, owner or guarantor of my mortgage posts payments during the term of any repayment plan it will be without prejudice to, and will not be deemed a waiver of, the acceleration of my loan or foreclosure action and related activities and shall not constitute a cure of my default under my loan unless such payments are sufficient to completely cure my entire default under my loan.
10. I agree that any prior waiver as to my payment of escrow items to the Servicer, owner or guarantor of my mortgage in connection with my loan has been revoked.
11. If I qualify for and enter into a repayment plan or mortgage modification, I agree to the establishment of an escrow account and the payment of escrow items if an escrow account has never existed on my loan.
12. I understand that the Servicer, owner or guarantor of my mortgage will collect and record personal information that I submit in this Uniform Borrower Assistance Package and during the evaluation process, including, but not limited to my name, address, telephone number, social security number, credit score, income, payment history, and information about my account balances and activity. I understand and consent to the disclosure of my personal information and the terms of any relief or foreclosure alternative that I received to an investor, insurer, guarantor or servicer that owns, insures, guarantees, or services my first lien mortgage loan(s) or to any HUD-Certified Housing Counselor.
13. I consent to being contacted concerning this request for mortgage assistance at any cellular or mobile telephone number I have provided to the Lender. This includes text messages and telephone calls to my cellular or mobile telephone.

Borrower Signature_____
Date_____
Co-Borrower Signature_____
Date



AUTHORIZATION TO PROVIDE AND RELEASE INFORMATION

TO: HANCOCK WHITNEY
DATE: _____
RE: LOAN NUMBER: _____
BORROWER(S): _____
PROPERTY ADDRESS: _____

I/(We) _____ (borrower(s) name(s)), currently residing at
_____ in the County of _____,
State of _____, hereby authorize Hancock Whitney to release, furnish and provide any information related to my loan
under loan number _____ to _____
_____ (name of third party).

**I UNDERSTAND THAT THIS AUTHORIZATION IS VALID UNTIL SUCH TIME THAT HANCOCK WHITNEY CONFIRMS IT HAS
RECEIVED WRITTEN NOTICE OF REVOCATION FROM ME.**

Borrower Signature

Co-borrower Signature

Guarantor Signature

Borrower Name (Printed)

Co-borrower Name (Printed)

Guarantor Name (Printed)



AFFIDAVIT OF "ARM'S LENGTH TRANSACTION"
TO BE COMPLETED FOR SHORT SALE TRANSACTION

Property address:

Street

City

State

Zip

All parties to the contract to purchase aforementioned property dated:

Herby affirm:

1. That this is an "Arm's Length Transaction" and that no party to this contract is a family member, business associate, or share a business interest with the mortgagor.
2. Further, there are no hidden terms or special understandings, between the Seller or Buyer or their Agents or Mortgagor.
3. That neither the Buyers and Sellers nor their Agents have any agreements written or implied that will allow the Seller to remain in the property as renters or regain ownership of said property at any time after the execution of the short sale transaction.
4. That with the sole exception of payments of Agent's Commission, neither the Seller, Buyer nor any other parties to this transaction shall receive any proceeds of the short sale transaction and all proceeds shall be payable solely to the mortgagor.

Seller

Date

Seller

Date

Seller

Date

Request for Transcript of Tax Return

OMB No. 1545-1872

▶ Request may be rejected if the form is incomplete or illegible.

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 "Order a Transcript" 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.	

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 IRS 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 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 ☐

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 30 calendar 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 30 calendar 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 2010, filed in 2011, will not be available from the IRS until 2012. 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 45 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. _____

Check this box if you have notified the IRS or the IRS has notified you that one of the years for which you are requesting a transcript involved **identity theft** on your federal tax return ☐

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, **either** husband or wife 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.

Sign Here		Phone number of taxpayer on line 1a or 2a
	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.

What's New

The IRS has created a page on IRS.gov for information about Form 4506-T at www.irs.gov/form4506. 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.

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.

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 "Order a Transcript" or call 1-800-908-9946.

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 the "Internal Revenue Service" at:
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	RAIVS Team Stop 6716 AUSC Austin, TX 73301 512-460-2272
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	RAIVS Team Stop 37106 Fresno, CA 93888 559-456-5876
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York,	RAIVS Team Stop 6705 P-6 Kansas City, MO 64999

Chart for all other transcripts

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.

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.

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.

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 lived in or your business was in:

Mail or fax to the "Internal Revenue Service" at:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address

RAIVS Team
P.O. Box 9941
Mail Stop 6734
Ogden, UT 84409

801-620-6922

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

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 address on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address.

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.

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 Product Coordinating Committee
SE:W:CAR:MP:T:T:M:S
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224

Do not send the form to this address.