Form **4506-C** (September 2020)

Department of the Treasury - Internal Revenue Service

IVES Request for Transcript of Tax Return

OMB Number 1545-1872

▶ Do not sign this form unless all applicable lines have been completed
▶ Request may be rejected if the form is incomplete or illegible.
▶ For more information about Form 4506-C, visit www.irs.gov and search IVES.

1a. Name shown on tax return (if a joint return, enter the name shown first)

Francis Smith

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

5

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)

010 S ASH ST, DENVER, CO, 80222, Denver, 80222, Colorado

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

5a. IVES participant name, address, and SOR mailbox ID

5b. Customer file number (if applicable) (see instructions)

Caution: This tax transcript is being sent to the third party entered on Line 5a. Ensure that lines 5 through 8 are completed before signing. (see instructions)

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 **1040**

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 1120-S. Return transcripts are available for the current year and returns processed during the prior 3 processing years

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

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

7. 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 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213

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.

8. Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format (see instructions)

12/31/2020 12/31/2019 12/31/2018 12/31/2017

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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-C 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-C. See instructions.

Sign Here	***Signature*** (see instructions)	Date	Phone number of taxpayer on line 1a or 2a 3
	Print/Type name Francis Smith		
	Title (if line 1a above is a corporation, partnership, estate, or trust)		
	Spouse's signature		Date
	Print/Type name		

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What's New. Form 4506-C was created to be utilized by authorized IVES participants to order tax transcripts with the consent of the taxpayer.

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Desibnated Recipient Notification. Internal Revenue Code, Section 6103(c), limits disclosure and use of return information provided pursuant to your consent and holds the recipient subject to penalties, brought by private right of action, for any unauthorized access, other use, or redisclosure without your express permission or request.

Purpose of form. Use Form 4506-C to request tax return information through an authorized IVES participant. You will designate an IVES participant to receive the information on line 5a.

Note: If you are unsure of which type of transcript you need, check with the party requesting your tax information.

Where to file. The IVES participant will fax Form 4506-C with the approved IVES cover sheet to their assigned Service Center.

Chart for ordering transcripts

If your assigned Service Center is:	Fax the requests with the approved coversheet to:
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Fresno Submission Processing Center	Fresno IVES Team 844-249-6239
Kansas City Submission Processing Center	Kansas City IVES Team 844-249-8128
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Specific Instructions

Line 1b. Enter the social security number (SSN) or individual taxpayer identification number (ITIN) for the individual listed on line 1a, or enter the employer identification number (EIN) for the business listed on line 1a.

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, or Form 8822-B,Change of Address or Responsible Party - Business, with Form 4506-C.

Line 5b. Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number cannot contain an SSN, ITIN or EIN. Completion of this line is not required.

Note. If you use an SSN, name or combination of both, we will not input the information and the customer file number will reflect a generic entry of "9999999999" on the transcript.

Line 8. Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year, fiscal year or quarter. Enter each quarter requested for quarterly returns. Example: Enter 12/31/2018 for a calendar year 2018 Form 1040 transcript.

Signature and date. Form 4506-C must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506-C within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines, including lines 5a through 8, 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 if unchecked.*

Individuals. Transcripts listed on on line 6 may be furnished to either spouse if jointly filed. Only one signature is required. Sign Form 4506-C exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506-C 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-C but must provide documentation to support the requester's right to receive the information.

Partnerships. Generally, Form 4506-C can be signed by any person who was a member of the partnership during any part of the tax period requested on line 8.

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-C 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 sign Form 4506-C.

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-C 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.
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-C simpler, we would be happy to hear from you. You can write to:

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Sign Here	***Signature*** (see instructions)	Date	Phone number of taxpayer on line 1a or 2a 3
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Signature by a representative. A representative can sign Form 4506-C 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 sign Form 4506-C.

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Signature by a representative. A representative can sign Form 4506-C 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 sign Form 4506-C.

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-C 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.
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-C simpler, we would be happy to hear from you. You can write to:

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

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

Acknowledgement of California Counseling Requirement

Pursuant to Cal. Civ. Code § 1923.2(k)

Date of Counseling: ____________________

A lender must provide a prospective borrower a list of not fewer than 10 housing counseling agencies approved by the United States Department of Housing and Urban Development to engage in reverse mortgage counseling, and a lender may not accept a final and complete application for a reverse mortgage or assess any fees upon a prospective borrower without receiving certification that the prospective borrower has received counseling from an approved counseling agency. The certification must indicate that the reverse mortgage counseling was conducted in person, unless the borrower elected to receive the counseling in another manner.

The certification must indicate that the reverse mortgage counseling was conducted in person, unless the borrower elected to receive the counseling in another manner

I/We hereby indicate that we elected to receive counseling in a manner other than in person (specify manner of counseling):

Telephone: ____________________

Skype: ____________________

Other: ____________________

ACKNOWLEDGEMENT

____ ____________________

Francis Smith Date

Address: ____

Telephone: ____________________

1

____ ____________________

Date

Address: **1**

Telephone: **123456789**

Counselor's Name (Printed)

HUD-Approved Counseling Agency Name

Counselor's Name (Signature & Date)

Address (City, State/Zip)

Telephone Number

Arizona Mortgage Broker Advance Fee Agreement

(Pursuant to Ariz. Rev. Stat. § 6-906(C))

Borrower Name(s):	**Francis Smith**
Mortgage Originator:	**South River Mortgage**
Property Address:	**010 S ASH ST, DENVER, CO, 80222, Denver, 80222, Colorado**
Date:	**11/10/2021**

ADVANCE FEES

The following fees are being charged in connection with the processing of your loan application. Other fees not shown here may be payable later and are shown on the Good Faith Estimate of Closing Costs. Nonrefundable fees are subject to applicable limitations of state or federal law.

Name of Fee	Amount	Important Information
Application Fee	**$0.00**	The application fee will be applied toward the cost of processing the loan. The fee is nonrefundable.
Appraisal Fee Deposit	**$0.00**	The deposit will be applied toward the total cost of the appraisal, which may exceed the amount of the deposit. You are responsible for the total cost of the appraisal. The deposit is nonrefundable unless the loan is denied or withdrawn prior to the Mortgage Broker ordering the appraisal. If the actual cost of the appraisal is less than your deposit, or if for any reason the appraisal is not performed, any excess amount will be refunded to you.
Credit Report Deposit	**$0.00**	The deposit will be applied toward the total cost of the credit report, which may exceed the amount of the deposit. You are responsible for the total cost of the credit report. The deposit is nonrefundable unless the loan is denied or withdrawn prior to the Mortgage Broker ordering the credit report. If the actual cost of the credit report is less than your deposit, or if for any reason the credit report is not performed, any excess amount will be refunded to you.
Other	$____________	Describe: ____________________ The deposit is: (check one) __________ nonrefundable; or __________ nonrefundable unless the loan is denied or withdrawn prior to performance of the work associated with this fee. The deposit will be applied toward the total cost of the item specified above, which may exceed the amount of the deposit. You are responsible for the total cost due. If the actual cost of the item specified above is less than your deposit, or if for any reason the work associated with this fee is not performed, any excess amount will be refunded to you.

The term for which the agreement is to remain in force before return of the advance or fee for nonperformance can be required is 30 days from the date of application date.

All documents provided by you or at your expense to the Mortgage Broker are your property and shall, at your request, be returned to you or transferred to any person designated by you (without further expense to you) if the loan is not consummated, provided that any such document is not prohibited by law from being transferred or returned.

Should you have any questions regarding your application, you may contact our representative shown below:

Representative's Name :	**Zach Emswiler**
Mortgage Broker's Name:	**South River Mortgage**
Address :	**1 Park Place, Suite 275, Annapolis, MD 21401**
Telephone Number:	**410-876-7166**

____

Francis Smith

South River Mortgage

Mortgage Broker Representative

I/We have read this disclosure and fully understand my/our obligations.

______________________________ ______________

Francis Smith **Date**