



AMERICAN EXPRESS FACSIMILE TRANSMITTAL SHEET

To: PHX Financial Review

FROM: _____

American Express Company

DATE: _____

AmEx Fax #: 800 219 8549

Total Pgs: 2

AmEx Phone #: 800 230 1289

Sender's Fax #: _____

RE: Blank 4506T IRS Form

Your 15 Digit Account Number:
37 _ _ _ _ _

URGENT, PLEASE REPLY

Instructions for completing this American Express Fax Cover Sheet

1. Fill out the FROM field with your name as it appears on your card.
2. Fill out your 15 digit account number (this is used for internal processing, your account number is not given to a third party)

Instructions for completing the Blank 4506T Form

1. Please refer to your copy of the tax return you filed for accuracy. Information you provide must match IRS files, or the documents obtained may be insufficient and your account could be canceled.
2. Typed forms are preferable. **Do not** make corrections by whiting or crossing out. These will cause the 4506T to be rejected and could result in cancellation. Please make changes by creating a new form. Do not write or type your account number anywhere on the 4506T form.
3. Complete lines 1-4 per the instructions on the 4506T for those lines
4. Line 5 is prefilled "American Express c/o Equifax Verification Services, 11432 Lackland Road, St. Louis, MO 63146".
5. Complete line 6. Line 6 must contain the name of the form you filed. Box 6A should be checked.
6. Leave lines 7 and 8 blank.
7. Line 9 must be completed as requested. Do not add years not requested. Use mm/dd/yyyy format for each year requested. Place each year on separate lines.
8. If you filed using a Tax ID instead of your Social Security Number, please put your Tax ID number in the Social Security Number field. Names and socials must be on corresponding lines for the IRS to accept this document.
9. Sign and date the 4506T. If completing for your business, please write your title under your signature.

After completing instructions for the American Express Cover sheet and Blank 4506T Form, return BOTH of the completed forms to: 1 800 219 8549. Once the forms are received, they will be processed in 5-7 business days. If you have questions regarding your review, please call 1800-230-1289.

If this facsimile is illegible, please call the phone number listed above. If you do not call it is assumed that it was received satisfactorily.

IMPORTANT NOTICE:

This facsimile contains privileged and confidential information intended only for the use of the individual or entity named above. If the reader of the facsimile is not the intended recipient or the employee or agent responsible for delivering it to the intended recipient, you are hereby notified that any use, dissemination or copying of the facsimile is strictly prohibited. If you have received the facsimile in error, please immediately notify us by telephone and return the original facsimile to us at the above address via the U.S. Postal Service Thank you.