Homebridge Wholesale
A division of Homebridge Financial Services, Inc.

4506-C Quick Reference Guide
Individual Taxpayer

IMPORTANT

A separate Form 4506-C is required for **each** borrower **and** for **each** income type, with the exception of W-2 and 1099 income. Borrowers with multiple sources of W-2 and 1099 income, one form per borrower is acceptable

NOTE: If requesting a 1040 for married borrowers, only one form **for the** for the primary borrower should be provided. ONLY the primary borrower information can be reflected and ONLY the primary borrower signs the form

LINE 1a (REQUIRED): Enter taxpayer's name **as it appears on the tax return.** Refer to the "NOTE" in the **IMPORTANT** box for married borrowers filing jointly. If married and filing separate returns separate 4506-C required

LINE 2a: **Must always be left blank** (including joint returns)

LINE 3 (REQUIRED): Enter current address, including apt, unit, or suite number

LINE 1b (REQUIRED): Enter primary taxpayer's full 9 digit social security number

LINE 2b: **Must always be left blank** (**including** joint returns)

LINE 4: Enter address as it appears on tax return **if different from line 3**. This line can contain multiple previous addresses as necessary

LINE 5a (REQUIRED): **Enter all information below:**
FraudTechnology.com - SECURED123 - 3500 Fairlane Farms Rd #2 Wellington FL 33414 - 855-714-7171

LINE 5b: May be left blank

LINE 6 (Required when requesting tax return transcripts): Enter type of return (1040) requested

LINE 6a-c: Only **ONE box** may be checked. **Forms with multiple checked boxes will NOT be accepted**

LINE 7: Check for W-2 and 1099 income **only**

LINE 8 (REQUIRED): Enter the tax year(s) requested in mm/dd/yyyy format

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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)*	**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)*

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

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 1120S. 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 tax year or period using the mm/dd/yyyy format *(see instructions)*
/ /   / /   / /   / /

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, 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
Print/Type name		
Title *(if line 1a above is a corporation, partnership, estate, or trust)*		
Spouse's signature		Date
Print/Type name		

Catalog Number 72627P | www.irs.gov | Form **4506-C** (9-2020)
For Privacy Act and Paperwork Reduction Act Notice, see page 2.

KEY REMINDERS

GENERAL

- ***IRS Form dated September 2020 required***
- *The entire form must be legible and unaltered and **MUST BE** typed; handwritten in ink is **NOT** acceptable*
- *Must be dated within 120 days of IRS receipt*

LINE ENTRY

- *Line 6 must have a tax form number (1040)*
- ***Only one** box on lines 6a-c should be checked Multiple boxes **cannot** be checked*
- *W-2/1099 Request **Only**: Lines 6a-c must **not** be checked; Line 7 **must be** checked*
- *Line 8 must specify the tax year(s) requested*

SIGNATURES

- ***Must be legible and match tax return***
- *If joint return, only the primary borrower signs the form*
- *If name has changed since tax return filing, sign current name too*

REQUIRED: **Check signatory attestation box**

REMINDER: A complete and fully executed 4506-C form is required for **all** loans with the **exception of** non-credit qualfiying Streamlines and IRRRLs, and Simple Access Bank Statement, Simple Access Investor Cash Flow,and Simple Access Asset Qualifier loans

FORM 4506-C NEW REQUIREMENT REMINDERS

The 4506-C:

1. Must be typed (**excluding** the signatory attestation check box and signature line which may be handwritten in ink)
2. Cannot contain any editing or handwritten marks
3. Must only identify the specific data that needs processing and the data must be on the assigned lines as noted above

February 2022