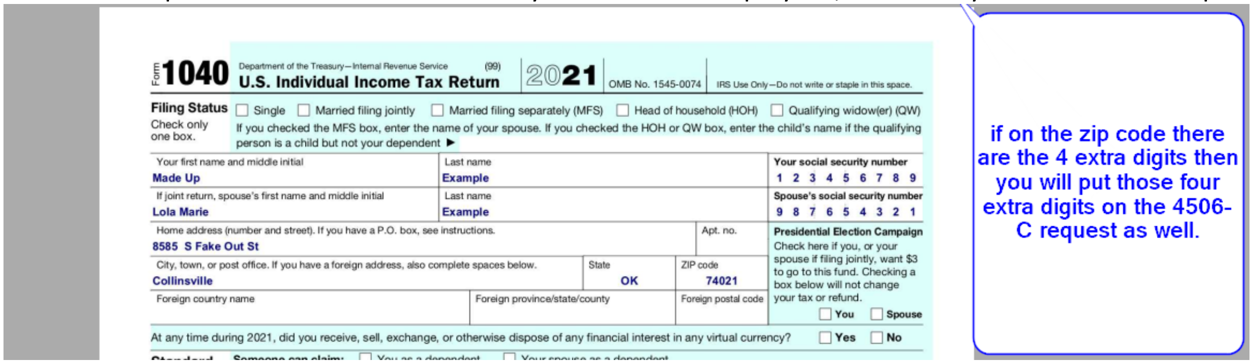
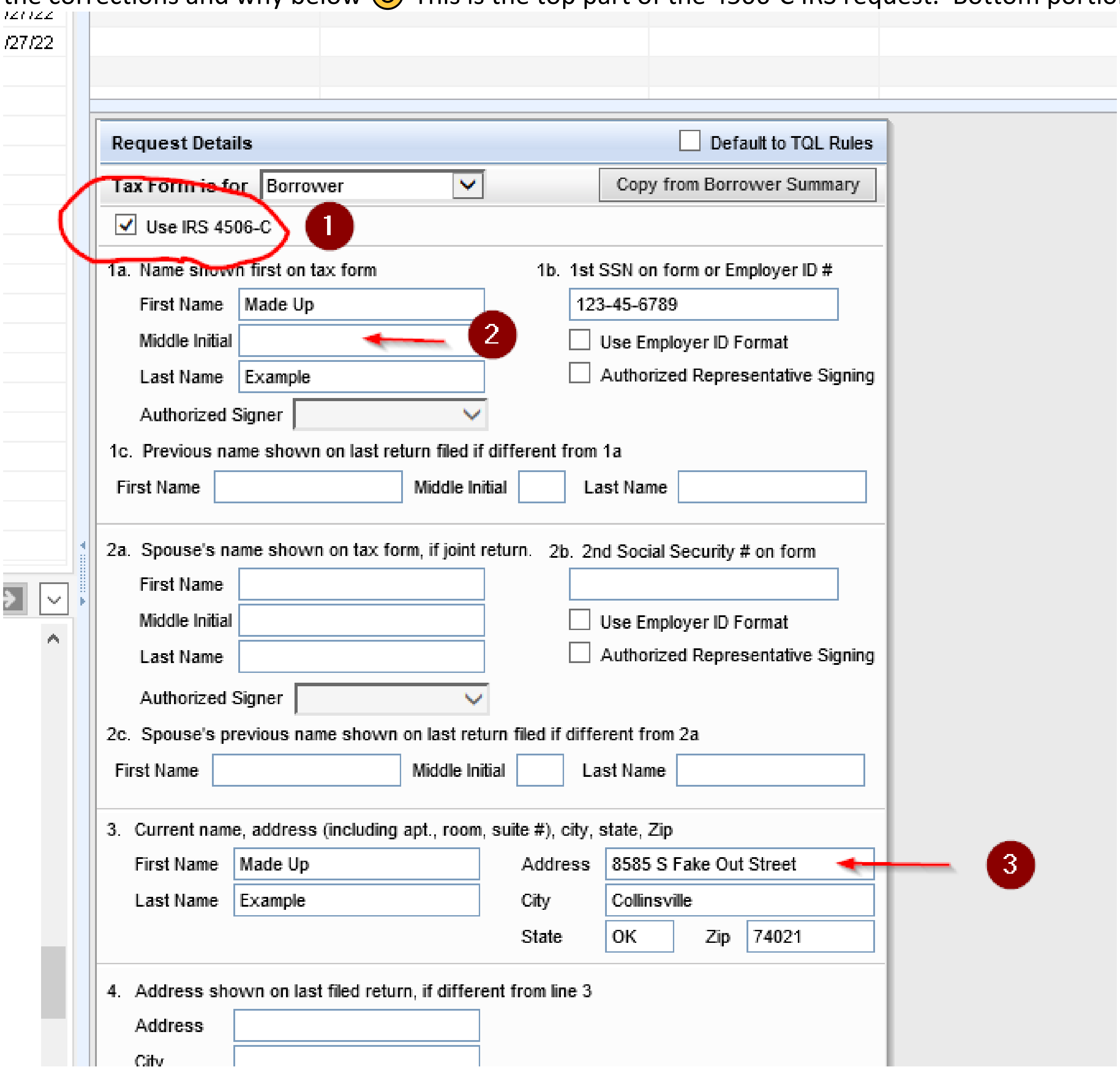
HOW TO COMPLETE THE 4506-C REQUEST FOR TAX TRANSCRIPT:

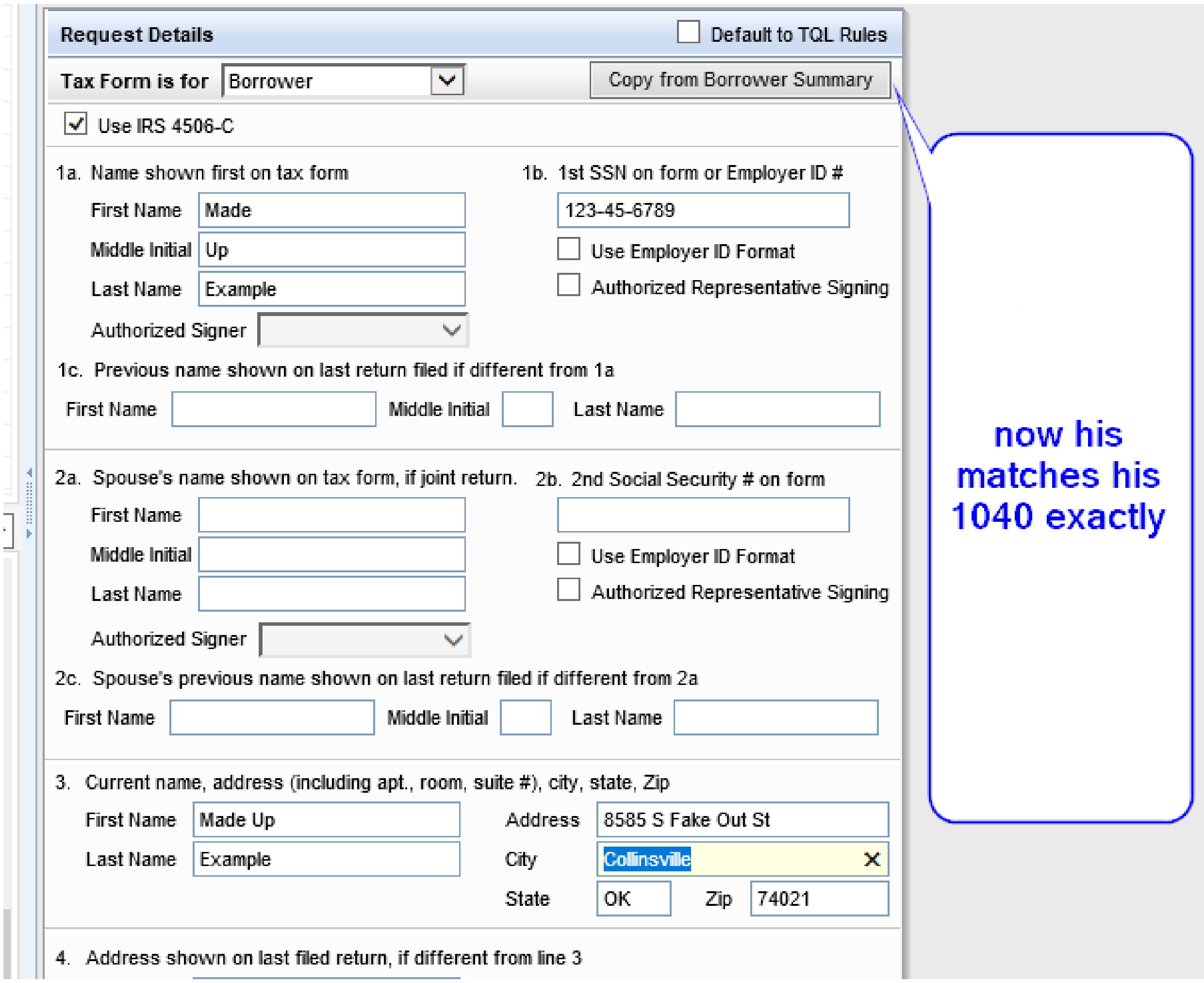
Here is the top of their 2021 return AND they are both W2 employees, so we only need W-2 transcripts in this case.




For W-2 employees I have found that you must complete two requests. The “both” button should not be used except when ordering a joint 1040 for both of them. See below his and then hers, request for tax transcript with explanations. If YOU pull in the information from the URLA, as you should do it will show exactly what is on pg 1 of the URLA. You will need to fix it to match the 1040. Here is how it looks when you just pull in, and the corrections and why below 😉 This is the top part of the 4506-C IRS request. Bottom portion to follow.



#1 this box must be checked marked OR the IRS will reject the form.
#2 move his middle name as is on 1040 to this box and delete where it on UP where it is located on the first name line.
#3 Street is spelled on the URLA so it pulls through spelled out on the 4506-C form. It needs to match the 1040 so change it to St, like the 1040 shows.
BELOW IS HOW IT SHOULD LOOK AFTER YOU MAKE THESE FIXES:


**Request Details** ☐ Default to TQL Rules

Tax Form is for: Borrower — Copy from Borrower Summary

☑ Use IRS 4506-C

1a. Name shown first on tax form
First Name: Made
Middle Initial: Up
Last Name: Example
Authorized Signer:

1b. 1st SSN on form or Employer ID #: 123-45-6789
☐ Use Employer ID Format
☐ Authorized Representative Signing

1c. Previous name shown on last return filed if different from 1a
First Name: — Middle Initial: — Last Name:

2a. Spouse's name shown on tax form, if joint return.
First Name:
Middle Initial:
Last Name:
Authorized Signer:

2b. 2nd Social Security # on form:
☐ Use Employer ID Format
☐ Authorized Representative Signing

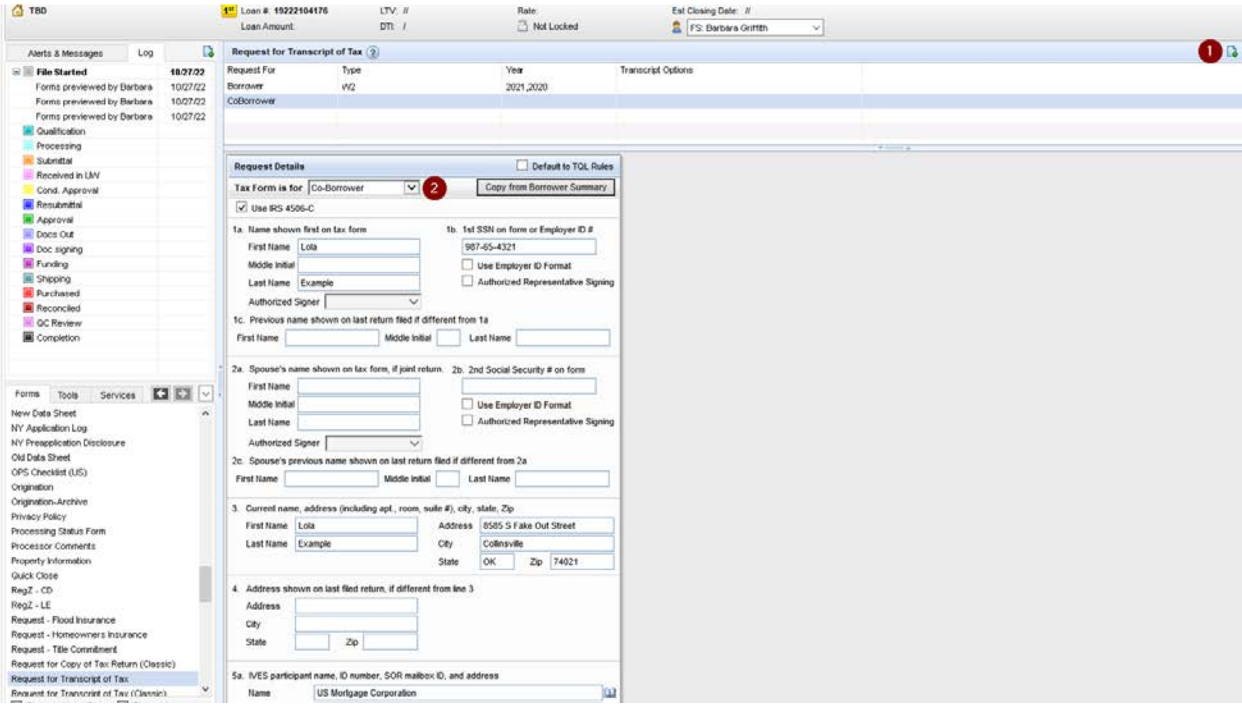
2c. Spouse's previous name shown on last return filed if different from 2a
First Name: — Middle Initial: — Last Name:

3. Current name, address (including apt., room, suite #), city, state, Zip
First Name: Made Up — Address: 8585 S Fake Out St
Last Name: Example — City: Collinsville
State: OK — Zip: 74021

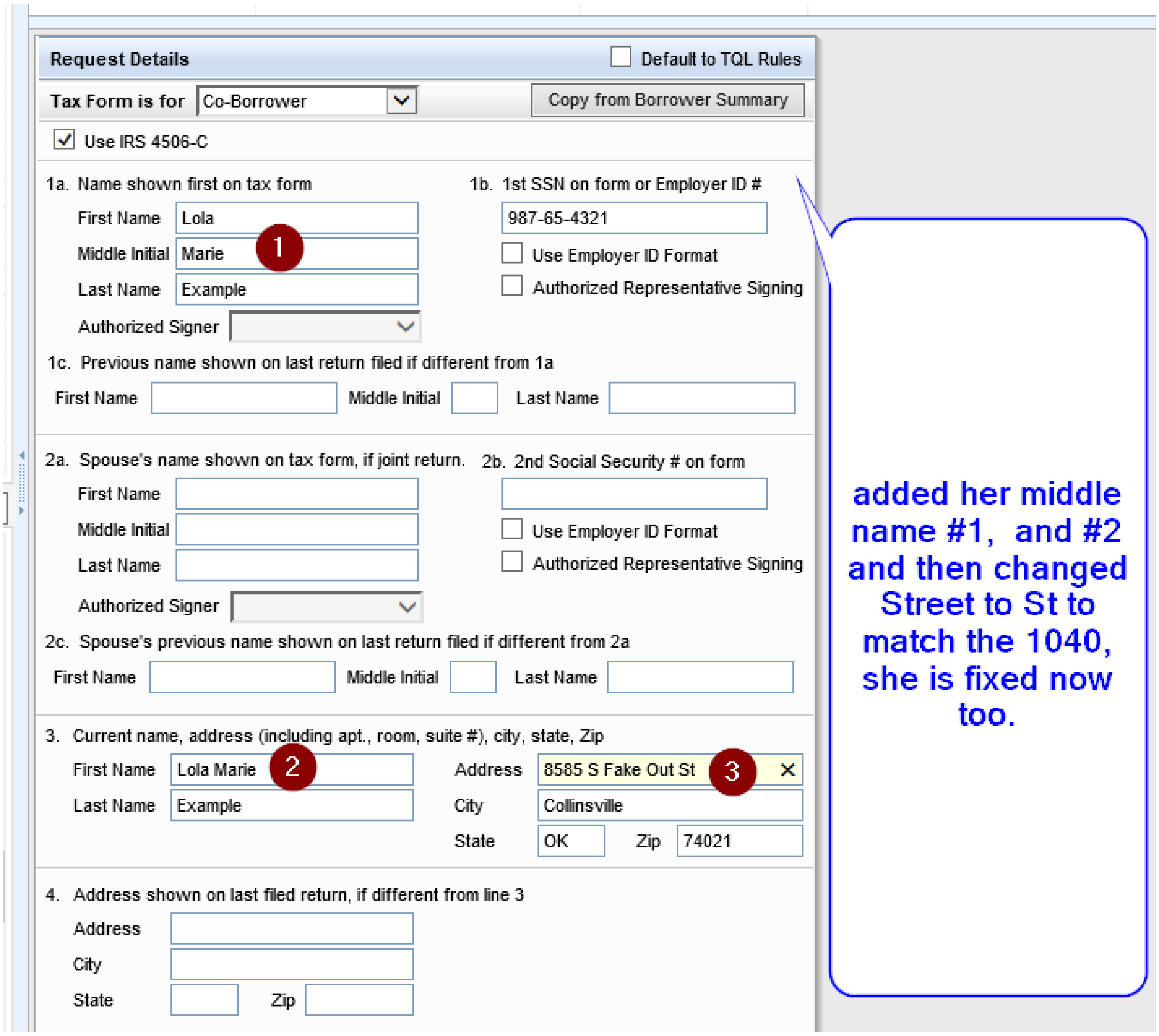
4. Address shown on last filed return, if different from line 3



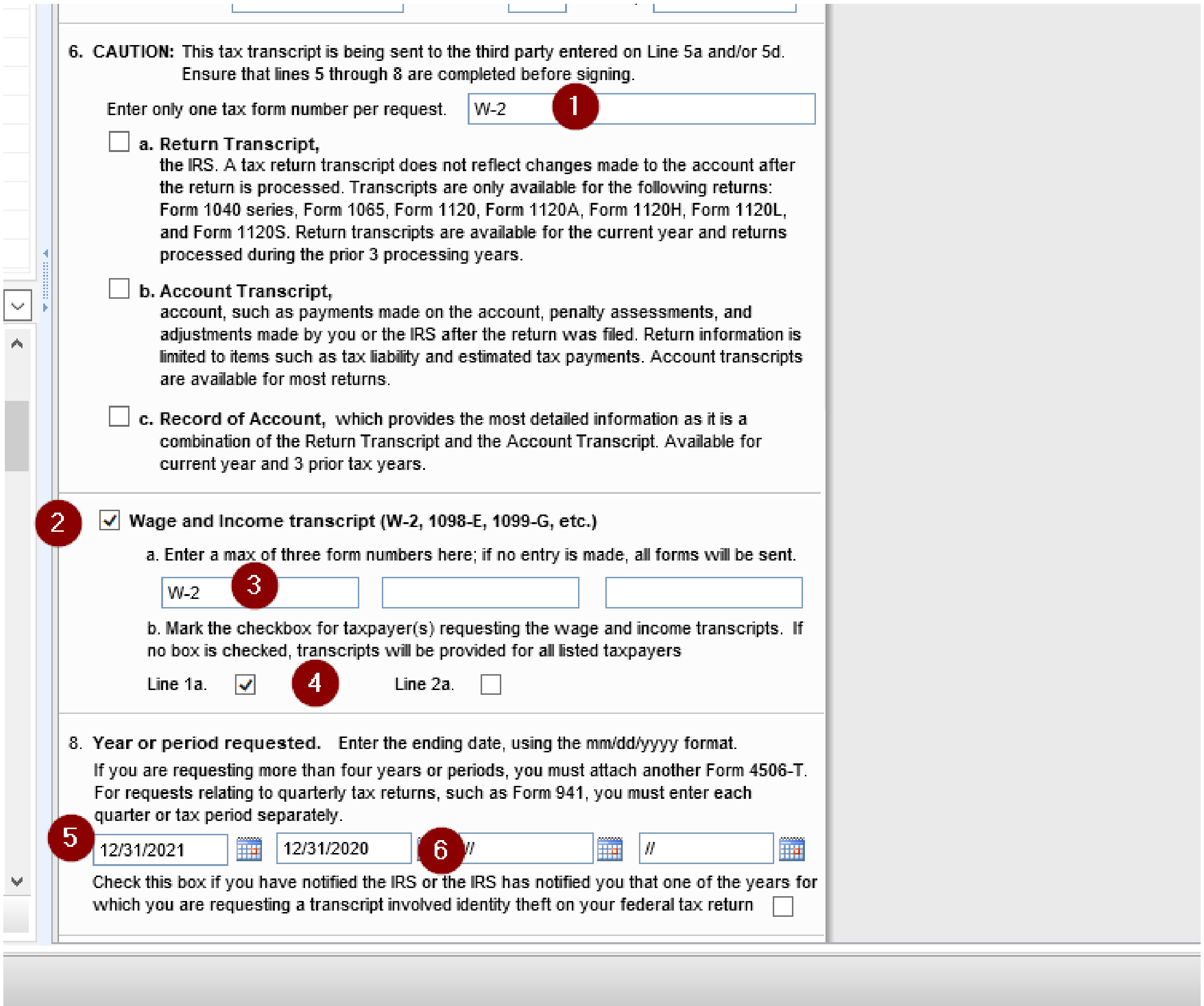
To complete hers you will click where I have marked #1 below, choose C-B from the dropdown where I have marked #2 and again what is on page 1 of the URLA for her pulls in, see below. You will need her information to match exactly what the 1040 says too. Corrections are as follows: Her middle name is spelled out on the 1040, spell it out here. Fix the Street to St just like you did on his 4506-C. Her corrected one is below the one that "pulls in".




AFTER FIXES HERS SHOULD look like this.




On both of their 4506-C forms the bottom should look just like this. BE SURE all six boxes, see below are marked.



6. CAUTION: This tax transcript is being sent to the third party entered on Line 5a and/or 5d.
Ensure that lines 5 through 8 are completed before signing.

Enter only one tax form number per request. W-2 1

a. Return Transcript, 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.

b. Account Transcript, 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.

2 ☑ Wage and Income transcript (W-2, 1098-E, 1099-G, etc.)

a. Enter a max of three form numbers here; if no entry is made, all forms will be sent.

W-2 3

b. Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers

Line 1a. ☑ 4 Line 2a. ☐

8. Year or period requested. Enter the ending date, 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.

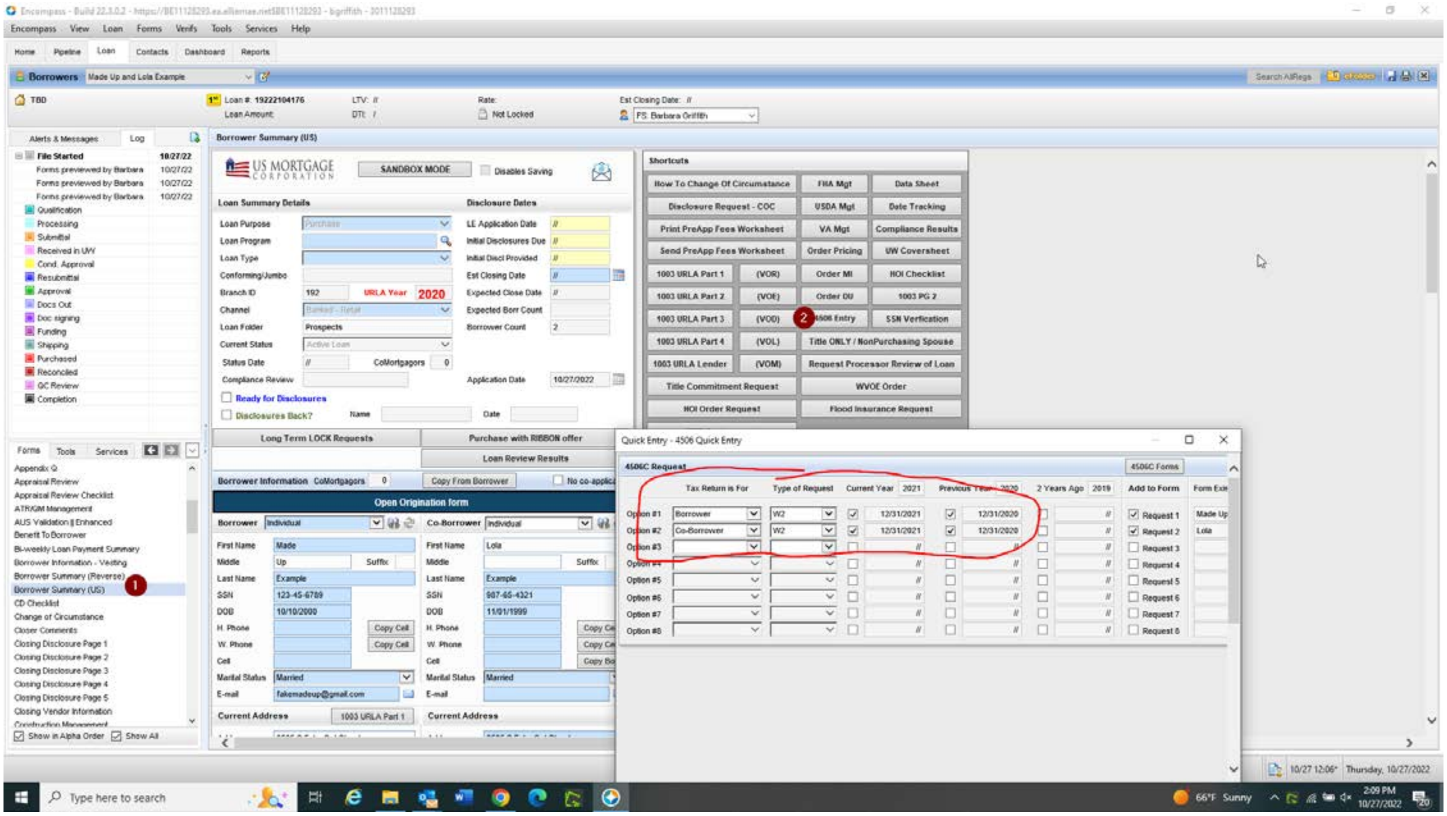
5 12/31/2021 12/31/2020 6 // //

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 ☐

IF WE NEED A 1040 FOR ONE OF OR BOTH OF THEM THE PERSON OR PERSONS WE NEED THE 1040 FOR THE BOTTOM OF THE 4506-C FORM WILL LOOK LIKE THIS, AGAIN MAKE SURE ALL BOXES I SHOW ARE MARKED AND DATES AT THE BOTTOM ARE CORRECT FOR WHAT YEARS WE NEED. BIG NOTE FOR LOANS WHERE ATLANTA HOUSING IS BEING UTLIZED WE WILL NEED THREE FULL YEARS OF 1040 TRANSCRIPTS and THREE FULL YEARS OF W-2 TRANSCRIPTS.

ADDED PART BELOW FOR YOUR CONVENIENCE:

Be sure you go to borrower summary, #1 and the 4506 entry #2 to be sure you are asking for W-2's for both of them and for correct years and so forth, looks like this:




Edited 12/5/22