

# Instructions to Request an IRS Tax Return Transcript using form 4506T

(Please see reverse side for "Confirmation of non-filing" instructions)

- Complete section **1a** and **1b**
  - Complete section **2a** and **2b** if you filed a joint tax return
- Complete section **3**
  - Complete section **4** if your address has changed since you filed your 2015 taxes
- On section **6** put **1040** in the blank
  - On section **a** put a check mark at the end of the line
- On section **9** put 12/31/2015
- Put a check in the box above the signature line
- Sign, Date and Phone number
- For **Tennessee** residents use this fax number 1-855-587-9604, for all others see page 2 of the 4506T form
- The 2015 IRS Return Transcript will be mailed to you
- Please send it to our office. Fax: 731-881-7036; Email: [faquestions@utm.edu](mailto:faquestions@utm.edu); Mail or bring to:

Office of Financial Aid and Scholarships  
 205 Administration Building  
 Martin, TN 38238

## EXAMPLE:

PLEASE NOTE: that forms with white out or scratch outs will not be accepted.

RETURN  
TRANSCRIPT

**Form 4506-T**  
 (Rev. September 2015)  
 Department of the Treasury  
 Internal Revenue Service

**Request for Transcript of Tax Return**

OMB No. 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-T, visit [www.irs.gov/form4506t](http://www.irs.gov/form4506t).

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](http://IRS.gov) and click on "Get a Tax Transcript..." under "Tools" or call 1-800-908-0946. 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.

<p><b>1a</b> Name shown on tax return. If a joint return, enter the name shown first.  <span style="font-size: 1.2em; color: green;">NAME</span></p>	<p><b>1b</b> First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)  <span style="font-size: 1.2em; color: green;">SOCIAL SECURITY #</span></p>
<p><b>2a</b> If a joint return, enter spouse's name shown on tax return.  <span style="font-size: 1.2em; color: green;">NAME (if joint return)</span></p>	<p><b>2b</b> Second social security number or individual taxpayer identification number if joint tax return  <span style="font-size: 1.2em; color: green;">SOCIAL SECURITY #</span></p>

**3** Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)  
NAME, ADDRESS, CITY, STATE, ZIP

**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 tax 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. FORM #

**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. 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 10 business 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 10 business 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 2011, filed in 2012, will likely not be available from the IRS until 2013. 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 10 business 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. 12/31/2015 / / / /

**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-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.

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-T. See instructions.

<b>SIGNATURE</b> <small>Signature (see instructions)</small>	<b>DATE</b> <small>Date</small>	<b>PHONE #</b> <small>Phone number of taxpayer on line 1a or 2a</small>
<b>Sign Here</b>		
<b>SIGNATURE (if joint)</b> <small>Spouse's signature</small>	<b>DATE</b> <small>Date</small>	

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37867N Form 4506-T (Rev. 9-2015)

# Instructions to Request a Confirmation of Non-Filing using form 4506T

(Please see reverse side for "Tax Return Transcript" instructions)

- Complete section **1a** and **1b**
- Complete section **3**
  - Complete section **4** if your address has changed since you filed your 2015 taxes
- On section **7** put a check mark at the end of the line
- On section **9** put 12/31/2015
- Put a check in the box above the signature line
- Sign, Date and Phone number
- For **Tennessee** residents use this fax number 1-859-669-3592, for all others see page 2 of the 4506T form
- The 2015 confirmation of non-filing letter will be mailed to you
- Please send it to our office, Fax: 731-881-7036; Email: [faquestions@utm.edu](mailto:faquestions@utm.edu); Mail or bring to:

Office of Financial Aid and Scholarships  
 205 Administration Building  
 Martin, TN 38238

## EXAMPLE:

**PLEASE NOTE:** that forms with white out or scratch outs will not be accepted.

**VERIFICATION OF NONFILING**

**4506-T**  
 Form (Rev. September 2015)  
 Department of the Treasury  
 Internal Revenue Service

**Request for Transcript of Tax Return**

▶ 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-T, visit [www.irs.gov/form4506t](http://www.irs.gov/form4506t).

OMB No. 1545-1872

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](http://irs.gov) and click on "Get a Tax Transcript..." under "Tools" 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. **NAME**

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

**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 tax 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 1095, 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. 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 10 business 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 10 business 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 2011, filed in 2012, will likely not be available from the IRS until 2013. 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 10 business 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. **12 / 31 / 2015**

**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-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.

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-T. See instructions.

**SIGNATURE** **DATE** **PHONE #**

Signature (see instructions) Date Phone number of taxpayer on line 1a or 2a

**Sign Here** Title (if line 1a above is a corporation, partnership, estate, or trust) Date

Spouse's signature Date

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form 4506-T (Rev. 9-2015)