

Tips on Using Form 4506-T for Self-Employed Customers

The IRS requires that the entire 4506-T form be filled out completely in order for it to be processed.

- » Find the correct form 4506-T from our Web site www.SantanderConsumerUSA.com. Go to Dealers > Dealer Resources > "Self Employed Applications - Form 4506-T."
- » List the correct tax schedule, such as 1040, 1065, 1120 etc.
(This is one of the most common errors and reason for rejected forms.)
- » The 4506-T used should have the following form type and revision date located at the bottom right of the page: "Form 4506-T (Rev. 1-2008)."
- » Required entries on the request must be legible and cannot be altered. Do not cross out, white out or put a line through anything on the original 4506-T. If an item is lined out, crossed out, or pasted, the form will be rejected by the IRS
(name, address, years, signature, date etc.)
- » If an item is initialed it is considered altered and will be rejected by the IRS.
- » The 4506 must be signed and dated within 60 days. *(Signature must be legible; the IRS requires the signature to look similar to the name.)*
- » All taxpayers listed on the form must sign the form. *(Electronic or stamped signatures are not accepted per the IRS.)* Please ensure the taxpayer information is entered correctly. See below:
 - » Section 1(a) is for the name of taxpayer 1(b) is for the taxpayer's social security number.
 - » Section 2(a) and (b) is for joint taxpayer information, i.e. name and social security number.
- » Please leave line 5 on the form blank. It is not necessary to enter an address.
(We have seen a significant amount of 4506-T forms rejected because the address written on line 5.)

We are working hard to ensure requests are submitted and processed as quickly as possible.



IRS Direct[®] Personal Tax Transcripts – How to Complete a Form 4506-T

To receive an IRS tax transcript, the 4506-T form will need to be completed and signed. All of the required fields are highlighted below with green arrows. Please make sure that your writing on the form is large and legible so we can complete your request faster.

Form 4506-T Request for Transcript of Tax Return
 (Rev. January 2008) Department of the Treasury Internal Revenue Service OMB No. 1545-1872

Do not sign this form unless all applicable lines have been completed. Read the instructions on page 2.
Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.

Tip: Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. 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.	1b First social security number on tax return or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return	2b Second social security number if joint tax return
3 _____	_____
4 _____	_____

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. The IRS has no control over what the third party does with the tax information.

IRS Direct, 11432 Lackland Road, St. Louis, MO 63146

Caution: DO NOT SIGN this form if a third party requires you to complete Form 4506-T, and lines 6 and 9 are blank.

Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number.

Form Type - 1040, W-2 or 1099

_____ **Check Box for 1040**

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 30 calendar days.

c Record of Account, which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days.

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. 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 2006, filed in 2007, will not be available from the IRS until 2008. 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 45 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.

____/____/____

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, **either** husband or wife must sign. If signed by a corporate officer, partner, 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.

Signature _____ **Date Within 60 Days** _____

Sign Here

Signature (see instructions) _____ Date _____

Title (if line 1a above is a corporation, partnership, estate, or trust) _____

Spouse's signature _____ Date _____

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form 4506-T (Rev. 1-2008)

If you have any questions, please call 1-866-373-4506. Agents are available Monday through Friday from 7am to 6pm Central time.