

HOW-TO GUIDE



Instructions for Completing Form 4506-C



Birchwood
CREDIT SERVICES, INC.

New 4506-C Tax Form

The deadline has been extended for transitioning to the new Form 4506-C. Both versions of the Form 4506-C will be accepted through February 28, 2023. **Effective March 1, 2023**, the newly published Form 4506-C will be the only form the IRS will accept. Please keep in mind that the new form will be read by the OCR (Optical Character Recognition) at the IRS, so the form should be filled out with only the necessary information.

1a
Taxpayer name, first, middle initial, last name. If ordering a Business transcript, the company name goes in the last name box, if it is too long, please use the first 22 characters

1b
Taxpayer identification number

4
Previous address shown on the last return filed if different from Line 3

7
Wage and income transcripts: Box 7 must be checked

7a
Enter up to 3 information types here, W-2, 1098, or 1099. If no specific form is requested, all forms will be returned and result in only one charge. Any entries marked NA or Not Applicable will be read as an entry by the OCR. If 1099 is listed as one of the forms, all wage and income will be returned. In order to get a specific 1099 or more than one 1099/1098 on file, those specific products must be listed (i.e. 1099-G, 1098-E)

7b
Mark the check box for which taxpayer you are requesting the wage and income on. Only one order per person on the form can be ordered. If you have both borrowers on the form, a separate order will need to be placed for the 2nd borrower

8
Enter only the year/years that you are requesting

Form 4506-C (October 2022)		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. Current name i. First name ii. Middle initial iii. Last name/BMF company name			2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers) i. Spouse's first name ii. Middle initial iii. Spouse's last name		
1b. First taxpayer identification number (see instructions)			2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)		
1c. Previous name shown on the last return filed if different from line 1a i. First name ii. Middle initial iii. Last name			2c. Spouse's previous name shown on the last return filed if different from line 2a i. First name ii. Middle initial iii. Last name		
3. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)					
a. Street address (including apt., room, or suite no.)		b. City	c. State	d. ZIP code	
4. Previous address shown on the last return filed if different from line 3 (see instructions)					
a. Street address (including apt., room, or suite no.)		b. City	c. State	d. ZIP code	
5a. IVES participant name, ID number, SOR mailbox ID, and address			ii. IVES participant ID number		iii. SOR mailbox ID
i. IVES participant name TaxReturnVerifications.com			301300		
iv. Street address (including apt., room, or suite no.) 327 Caldwell Drive, #100			v. City	vi. State	vii. ZIP code
			Goodlettsville	TN	37072
5b. Customer file number (if applicable) (see instructions)			5c. Unique identifier (if applicable) (see instructions)		
5d. Client name, telephone number, and address (this field cannot be blank or not applicable (NA))					
i. Client name			ii. Telephone number		
iii. Street address (including apt., room, or suite no.)			iv. City	v. State	vi. ZIP code
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. (see instructions)					
6. Transcript requested: Enter the tax form number here (1040, 1098, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts					
a. Return Transcript <input type="checkbox"/>		b. Account Transcript <input type="checkbox"/>		c. Record of Account <input type="checkbox"/>	
7. Wage and Income transcript (W-2, 1098-E, 1099-G, etc.) <input type="checkbox"/>					
a. Enter a max of three form numbers here; if no entry is made, all forms will be sent.					
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 <input type="checkbox"/>		Line 2a <input type="checkbox"/>			
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, if applicable, line 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; however, if both spouses' names and TINs are listed in lines 1a-1b and 2a-2b, both spouses must sign the request. 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.					
<input type="checkbox"/> Signatory attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.					
Signature for Line 1a (see instructions)		Date	Phone number of taxpayer on line 1a or 2a		
<input type="checkbox"/> Form 4506-C was signed by an Authorized Representative		<input type="checkbox"/> Signatory confirms document was electronically signed			
Print/Type name					
Sign Here					
Title (if line 1a above is a corporation, partnership, estate, or trust)					
Spouse's signature (required if listed on Line 2a)			Date		
<input type="checkbox"/> Form 4506-C was signed by an Authorized Representative		<input type="checkbox"/> Signatory confirms document was electronically signed			
Print/Type name					
Catalog Number 72627P		www.irs.gov		Form 4506-C (Rev. 10-2022)	
For Privacy Act and Paperwork Reduction Act Notice, see page 2.					

Field 2a
Spouse's name, first, middle initial, last name

Field 2b
Spouse's taxpayer identification number

5a iii
NON-Day 1 Certainty:
Order4506

Day 1 Certainty:
MThomas1

5b
Not required

5c
Not required

5d
This will be your company name, phone number, and address

6
Enter the tax form number you are ordering. Only one number can be entered, multiples will be rejected. Check only one box, A, B or C.

- If applicable, check the Authorized Representative box. **Form 2848** would need to accompany the 4506-C
- Signatory Box must be checked if electronically signed. Forms signed with an electronic signature without the box marked will be rejected
- Print/type name of taxpayer on Line 1a
- Title: See separate "Acceptable Titles" form if line 1a is a corporation, partnership, estate, or trust
- Follow the same rules for the Spouse's signature. Forms with missing signatures and dates will be rejected

Acceptable Titles

Refer to the following chart for guidelines on appropriate signatures for the type of return or return information you request.

Forms Filed	Signature and Date Requirements
Form 1065, <i>US Return of Partnership Income</i>	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Partner Limited Partner Current date
Form 1120, <i>US Corporation Income Tax Return</i> or Form 1120S (<i>small business</i>), <i>US Income Tax Return for an "S" Corporation</i>	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> President Vice President Secretary Treasurer Assistant Treasurer Chief Accounting Officer Any Tax Officer, including Controller 1% Shareholder (<i>for Corporations</i>) Shareholder (<i>for S-Corporations</i>) Current date
For an LLC that is not a Multi-Member Partnership or a Multi-Member Corporation	<ul style="list-style-type: none"> Signature of the Managing Member Exception: If a Form 8832, <i>Entity Classification Election</i>, has been filed then Signature can be: <ul style="list-style-type: none"> President Vice President Secretary Treasurer Current date
LLC is for a Multi-Member Partnership	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Partner Limited Partner Current date
LLC is for a Multi Member Corporation	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> President Vice President Secretary Treasurer Assistant Treasurer Chief Accounting Officer Current date



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Acceptable Titles

Forms Filed	Signature and Date Requirements
Form 94X series, <i>Employment Tax Returns</i>	<ul style="list-style-type: none"> Signature is based on the actual Filing Requirement of the requestor (<i>example: Filing Requirement is for Form 1120 you would use the 1120 signature requirements.</i>) Current date
Dissolved Corporations	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> President Vice President Secretary Treasurer Current date
Form 1041, <i>U.S. Income Tax Return for Estates and Trusts</i> For Estates:	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Executor/Executrix Administrator/Personal Representative Trustee Heir at law Next of kin Beneficiary Current date
Form 1041, <i>U.S. Income Tax Return for Estates and Trusts</i> For Trusts:	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Trustee Beneficiary Current date
Sole Proprietor	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Owner Sole Proprietor Current date
Form 1040 <i>series</i>	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> The taxpayer (<i>individual return</i>) The taxpayer named on either Line 1 or Line 2 of your request (<i>joint return</i>) Current date
SSN W-2, Form 1099	<ul style="list-style-type: none"> Signature of: <ul style="list-style-type: none"> The taxpayer who received the wages
EIN W-2	<ul style="list-style-type: none"> Signature of one of the following: <ul style="list-style-type: none"> Officer of organization Authorized delegate



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Frequently Asked Questions

1. Can I order a joint transcript if I only have a 4506-C for one borrower?

If the borrowers filed jointly you will get a return for both borrowers no matter which borrower you submit it for.

2. Can I order W's for both borrower together?

No, separate orders will have to be placed for each borrower, if two borrowers are on one form, you may use the same form for both orders

3. Checking boxes on Line 6

You can now only check which boxes you are ordering. Checking all boxes is no longer accepted and will result in a rejection.

4. Ordering multiple years

Only put the years you are ordering on the form. Extra years will result in a rejection.

5. What is the Ives Participant ID number?

301300

6. What information goes on Line 5a? – This can no longer be left blank:

TaxReturnVerifications.com
327 Caldwell Dr. #100
Goodlettsville, TN 37072

7. SOR Mailbox ID

NON-Day 1 Certainty: Order4506 Day 1 Certainty: MThomas1

8. What information goes on Line 5d?

Your company name, address and phone number

9. Can I rush an order?

We can rush the QC process which sends it to the IRS that much faster, typically within 10 minutes of placing the order, but once it's at the IRS it cannot be rushed.

10. Can I cancel an order?

If you call us within 10 minutes of placing the order we can call the servicer and try to cancel the order. If your order is already at the IRS, it cannot be canceled.

11. How do I order Extensions or Amendments?

For either of these options you will need to choose the 6C option instead of the 6A – this will return all Extensions and/or Amendments

12. How do I order a Business/Company Transcript?

Business returns need to be ordered with the business name, address and Tax ID#. They must have the correct title filled in. The specific Fiscal Year will need to be filled in on line 9, not just the normal tax year ending 12/31/YEAR. A fiscal year can end on any date, and can be different for each company.

13. How long does it take for the previous year's tax transcripts to become available?

Previous Year 1040 transcripts may not be available until 2-3 weeks after submission to the IRS if e-filed (6-8 weeks if mailed). If an order is requested prematurely, the IRS will return a "No Record of Return Found."

Previous Year Wage and Income transcripts (W-2, 1099, 1098) will become available in intermittent batches as they are filed through the IRS. However, majority of the previous year Wage and Income transcripts are expected to be available in June or July of the current year.



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