



**Housing Application Check List  
Pitkin County**

**Please use this check list to complete your Housing Application. The Housing office will use this check list to verify that you have submitted all the information required. Please make sure each box is checked that pertains to your application. The following items must be included with the application. If this is a joint application both applicants information must be included.**

**Check List**

- \$20.00** (twenty dollars) per unit application fee payable to the Town of Snowmass Village Housing Department.
- 80% (eighty percent) of the applicant's income must be earned within Pitkin County and verified by a W-2.**

**Financial Information:**

- 2017 Tax Returns                       2017 W-2's                       2017 Business Tax Returns
- 2018 Tax Returns                       2018 W-2's                       2018 Business Tax Returns
- 2019 Tax Returns                       2019 W-2's                       2019 Business Tax Returns
- A copy of your current Aspen/State of CO business license.
- Copy of a current Profit and Loss Statement
- An **Employment Verification** form must be completed and signed by each employer for the time listed on the Employment History sheet.
- A **loan pre-qualification letter** from a institution on letterhead, dated and signed by an officer stating the maximum amount the applicant is qualified to obtain.

**Net worth back up information:**

- Copies of all bank account statements: Checking, Savings, Certificate of Deposits and Money Markets.
- Copies of Stocks/Bonds Certificates and statement of the current values.
- Copy of the current annual county property tax bill showing assessed value of real estate owned.
- Automobiles/Planes/Boats/Motorcycles copy the title or registration.
- Copy of the blue book value for all vehicles.
- Copy of your Life Insurance policy and statement of the cash value.
- Copy of Retirement accounts.
- Copy of bank loans.
- Copy of mortgage payoff.
- Copy of Auto loan payoffs.
- Copy of all recent credit card statements.

**Applicant/s:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## 2020 Maximum Income and Networth Guideline

Home Price	2020 CPI 2.3%	2020 CPI 2.3%	Home Price	2020 CPI 2.3%	2020 CPI 2.3%
	Max. Income	Max Networth		Max. Income	Max NetWorth
\$ 100,000.00	\$99,516	\$84,898	\$ 450,000.00	\$242,815	\$382,042
\$ 110,000.00	\$103,610	\$93,388	\$ 460,000.00	\$246,908	\$390,532
\$ 120,000.00	\$107,705	\$101,878	\$ 470,000.00	\$248,877	\$399,022
\$ 130,000.00	\$111,800	\$110,368	\$ 480,000.00	\$258,442	\$407,511
\$ 140,000.00	\$115,896	\$118,858	\$ 490,000.00	\$263,826	\$416,001
\$ 150,000.00	\$119,991	\$127,347	\$ 500,000.00	\$269,211	\$424,491
\$ 160,000.00	\$124,086	\$135,837	\$ 510,000.00	\$274,595	\$432,981
\$ 170,000.00	\$128,181	\$144,327	\$ 520,000.00	\$279,979	\$441,471
\$ 180,000.00	\$132,275	\$152,817	\$ 530,000.00	\$285,363	\$449,961
\$ 190,000.00	\$136,370	\$161,307	\$ 540,000.00	\$290,747	\$458,450
\$ 200,000.00	\$140,465	\$169,796	\$ 550,000.00	\$296,132	\$466,940
\$ 210,000.00	\$144,560	\$178,286	\$ 560,000.00	\$301,516	\$475,430
\$ 220,000.00	\$148,656	\$186,776	\$ 570,000.00	\$306,900	\$483,920
\$ 230,000.00	\$152,751	\$195,266	\$ 580,000.00	\$312,284	\$492,410
\$ 240,000.00	\$156,846	\$203,756	\$ 590,000.00	\$317,668	\$500,900
\$ 250,000.00	\$160,940	\$212,246	\$ 600,000.00	\$323,053	\$509,389
\$ 260,000.00	\$165,035	\$220,735	\$ 610,000.00	\$328,437	\$517,879
\$ 270,000.00	\$169,130	\$229,225	\$ 620,000.00	\$333,821	\$526,369
\$ 280,000.00	\$173,225	\$237,715	\$ 630,000.00	\$339,205	\$534,859
\$ 290,000.00	\$177,321	\$246,205	\$ 640,000.00	\$344,589	\$543,349
\$ 300,000.00	\$181,416	\$254,695	\$ 650,000.00	\$349,974	\$551,838
\$ 310,000.00	\$185,511	\$263,184	\$ 660,000.00	\$355,358	\$560,328
\$ 320,000.00	\$189,605	\$271,674	\$ 670,000.00	\$355,358	\$566,594
\$ 330,000.00	\$193,700	\$280,164	\$ 680,000.00	\$355,358	\$566,594
\$ 340,000.00	\$197,795	\$288,654	\$ 690,000.00	\$355,358	\$566,594
\$ 350,000.00	\$201,890	\$297,144	\$ 700,000.00	\$355,358	\$566,594
\$ 360,000.00	\$205,986	\$305,634	\$ 710,000.00	\$355,358	\$566,594
\$ 370,000.00	\$210,081	\$314,123	\$ 720,000.00	\$355,358	\$566,594
\$ 380,000.00	\$214,176	\$322,613	\$ 730,000.00	\$355,358	\$566,594
\$ 390,000.00	\$218,167	\$331,103	\$ 740,000.00	\$355,358	\$566,594
\$ 400,000.00	\$222,341	\$339,593	\$ 750,000.00	\$355,358	\$566,594
\$ 410,000.00	\$226,436	\$348,083	\$ 760,000.00	\$355,358	\$566,594
\$ 420,000.00	\$230,530	\$356,573	\$ 770,000.00	\$355,358	\$566,594
\$ 430,000.00	\$234,625	\$365,062	\$ 780,000.00	\$355,358	\$566,594
\$ 440,000.00	\$238,720	\$373,552	\$ 790,000.00	\$355,358	\$566,594



## Town of Snowmass Village Employee Housing Sales Application Pitkin County Employee **Information and Instructions**

Welcome to the Town of Snowmass Village For Sale Employee Housing program. Enclosed is the application with instructions and information for this program. If you have any additional questions after you have read this packet, please contact the Housing Department at 923-2360 or at [housing@tosv.com](mailto:housing@tosv.com) or at 555 Deerfield Drive (within the Mountain View Apartment complex) Monday through Friday 8:00am to 5:00pm.

### **General Program Information**

- 1) This is an honesty based program. All applications are expected to be completed honestly and thoroughly.
- 2) A **\$20.00** (twenty dollars) per unit application fee payable to the Town of Snowmass Village Housing Department. Cash and checks accepted.
- 3) An application is active for 12 (twelve) consecutive months from the date it is submitted to the Housing Department
- 4) It is up to the applicant to provide all the information and submit a completed application to the Housing Department to an acceptable level before the application deadline. **Incomplete applications will not be accepted.**
- 5) You are welcome to wipe out all account numbers from your statements. Please do not wipe out the names.
- 6) Joint ownership is permitted as long as one applicant, as defined, is working in Pitkin County. **Both applicants must submit a completed application at the same time**  
**All financial information will be combined to determine eligibility.**

### **Application Instructions**

- 1) Complete the Housing Department Information Sheet.
- 2) List all Pitkin County full time employment on the Employment History Form. Applicants must be an employee of a Pitkin County based business that has a current business license, whose principle place of business is conducted in Pitkin County, and be employed a minimum of one thousand four hundred (1,400) hours within eight (8) to twelve (12) months at the time of application and being awarded a unit. Conversion: 40 hours per week for 35 weeks per calendar year OR 35 hours per week for 40

weeks per calendar year OR 32.56 hours per week for 43 weeks per calendar year. Employment time will not be double counted.

3) An Employment Verification form must be completed and signed by each employer for the time listed on the Employment History sheet. Social Security printouts will be accepted as a substitute if the employment verification form can not be filled out by an employer.

4) A loan pre-qualification letter is required from a financial institution on letterhead, dated and signed by an officer stating the maximum amount the applicant is qualified to obtain. The amount stated by the financial institution is part of the approval process for a unit.

**5) Copies of the last three years of filed and signed (if applicable) complete personal Federal Income Tax forms and W-2's. Non-taxable income is to be included and verifiable documentation will need to be submitted. 80% (eighty percent) of the applicant's income must be earned within Pitkin County and verified by a W-2.**

**Calculating Income level: The last three (3) years of filed and signed (if applicable) Federal Income Tax Adjusted Gross Income (line 33 on form 1040 or line 4 on form 1040 EZ) added together then divided by three (3). Tax free income must be reported and will be included in the Maximum Income average.**

6) Complete and sign the Ownership of Other Property and Persons Per Bedroom form.

7) Complete and sign the Acknowledgments and Verification of True and Accurate Information form.

8) Complete and sign the Authorization to Obtain a Copy of Loan Application form.

9) If you own your own business, you must submit a copy of your current business license, your last three (3) years of filed business Federal Income Tax and a current Profit and Loss Statement. 80% (eighty percent) of the business must be conducted within Pitkin County to be a qualified Pitkin County business.

10) The Financial Statement is to be completed with real numbers (i.e.- if your checking account statement says your balance is \$1,856.32, please write in \$1,856. DO NOT round up or down the numbers - just drop off the cents!) For each item listed on the Financial Statement, **copies of back up documentation must be submitted.**

**For Example: Cash in the bank - bank statements**

**Automobiles/Planes/Boats/Motorcycles - blue book value, and title, and registration.**

**Free Market Stocks/Bonds - copies of the certificates AND a recent statement or financial value.**

**Property- most current County property tax forms**

**Net Worth of Business - current Profit and Loss Statement**

**Loans/Mortgage - pay off amounts from the lending institution**

**Credit Cards- most current statements showing pay off amounts.**

Calculating Net Worth level:

Assets - (cash [checking, savings, money market], automobiles, planes, boats, motorcycles, free market stocks, bonds, insurance and real estate, retirement accounts and net worth in a personal business)

MINUS

Liabilities - (bank loans, mortgage, credit card debt, college loans and car, boat or plane loans)

MINUS

Retirement and College Savings Funds - (IRA, KOEGH, 401K, FPPA - Tax Deferred Retirement Account, 529 College Saving)

EQUALS

Net Worth

NOTE - Contingent liabilities and personal effects are not included in this calculation.

11) The entire completed application and application fee must be submitted by the designated date and time specified by the Housing Department located at 555 Deerfield Drive in the Mountain View Apartment complex. **All applications submitted after the specified date and time will not be accepted. All incomplete applications will not be accepted.**

**General Information**

- Each applicant will be given a number of chances per their employment time.
- All chances will be drawn from the bin.
- The order that the names are drawn is the order that the applicants will be permitted to accept the unit they are applying for.
- All applicants will be confirmed for the unit they have applied for by persons per bedroom and financial qualifications before being placed in the lottery.
- Only the first time that an applicant's name is drawn will they be permitted to accept a unit.
- Should a selected applicant change their mind about their chosen unit, the next applicant on the drawn list will be allowed to accept that unit.
- The Seller and Buyer will have 7 (seven) calendar days by 5:00 pm to bring a completed contract to the Housing Department.
- The Seller and Buyer can choose the title company.

**Lottery Procedures**

The following lottery procedures were approved by the Town of Snowmass Village Town Council in November 2019. After applicants are qualified they will be entered into a lottery tier using the priorities listed below.

Lottery Tiers	Lottery Priorities
1st	In-Complex
2nd	Downsizing from one Permanent Moderate Housing unit to another unit, provided the downsized unit has fewer bedrooms than the current unit. In the case of new construction, no more than 25% of the initial units shall be made available for downsizing unless otherwise established by the Town Council.
3rd	Snowmass Village full-time employment with 3 or more years
4th	Snowmass Village full-time employment with 12-35 months
5th	Snowmass Village full-time employment with 3 or more years; 2 people may apply for a 3-bedroom unit
6th	Snowmass Village full-time employment with 12-35 months; 2 people may apply for a 3-bedroom unit
7th	Pitkin County full-time employment with 3 or more years

**17.3.4.3 Unit Size and Occupancy Requirements.** In addition to the above Lottery Priorities and to maximize the occupancy of housing units, an applicant can only apply to purchase a housing unit to accommodate the number of persons that will be residing with the applicant. The number of persons will include a dependent as defined in the Internal Revenue Code, or a minor child who resides on a part time basis of not less than one hundred twenty-one (121) days per calendar year as a result of an order of a court. A first priority applicant can only apply to purchase a housing unit with the number of bedrooms as follows:

**First Priority Occupancy Table #1**

Total Persons	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms
1*	X	X		
2	X	X		
3		X	X	
4		X	X	X
4+			X	X

\*One person is not eligible to purchase a detached single-family home.

**Second Priority Occupancy Table #2**

Total Persons	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms
2	X	X	X	

After the first priority qualified applicants have been selected the Second Priority Occupancy Table will be used if necessary. This table will only be used for qualified Snowmass Village employee applicants in the 5<sup>th</sup> and 6<sup>th</sup> lottery tier from the 17.2.4.1 lottery procedures table.

Note: All Pitkin County employees in the 7<sup>th</sup> lottery tier must meet the requirements listed in the First Priority Occupancy Table #1.

Town of Snowmass Village  
Employee Housing Sales Application

**HOUSING DEPARTMENT INFORMATION SHEET**

Applicants Name: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Driver's License: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Co-Applicants Name: \_\_\_\_\_

Social Security No.: \_\_\_\_\_ Driver's License: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Physical Address: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Home No.: \_\_\_\_\_ Work No.: \_\_\_\_\_ Other No.: \_\_\_\_\_

What name(s) will be on the deed? \_\_\_\_\_

**DO NOT WRITE BELOW - OFFICE USE ONLY**

\_\_\_\_\_  
Employment time: \_\_\_\_\_ Total number of chances: \_\_\_\_\_

Net Worth: \_\_\_\_\_ Average Annual Income: \_\_\_\_\_

No. of Adults \_\_\_\_\_ No. of Dependents: \_\_\_\_\_ Housing Unit Size: \_\_\_\_\_

Bank approved amount: \_\_\_\_\_

Date application(s) submitted: \_\_\_\_\_

Date fee(s) paid: \_\_\_\_\_

Unit(s) applied for: \_\_\_\_\_

# Town of Snowmass Village Employee Housing Sales Application

## **EMPLOYMENT HISTORY**

Applicant's Name: \_\_\_\_\_

Co-Applicant's  
Name: \_\_\_\_\_

### **LIST ALL PITKIN COUNTY LICENSED BASED EMPLOYMENT ONLY**

**Beginning & Ending Dates**  
(Month & year)

**Company Name**


**Note: One employment verification form is required for each employer listed above.**





Town of Snowmass Village  
Employee Housing Sales Application

**EMPLOYMENT VERIFICATION**

I am verifying that \_\_\_\_\_ is/has been employed by  
Name of applicant  
\_\_\_\_\_ and that this business is located and licensed within  
Name of business  
the Pitkin County. I am also verifying that this employee work(s/ed) over 1,400 hours  
within eight (8) to 12 (twelve) months per calendar year, as follows:

\_\_\_\_\_  
month/year start      month/year end      Location

I certify that I am authorized to sign on behalf of \_\_\_\_\_  
Business name

\_\_\_\_\_  
Employer signature      Date

\_\_\_\_\_  
Printed name      Title

\_\_\_\_\_  
Contact phone no.

**You will need to make additional copies of this form if you have more than one employer listed on the Employment History page.**



Town of Snowmass Village  
Employee Housing Sales Application

**EMPLOYMENT VERIFICATION**

I am verifying that \_\_\_\_\_ is/has been employed by  
Name of applicant

\_\_\_\_\_ and that this business is located and licensed within  
Name of business

the Pitkin County. I am also verifying that this employee work(s/ed) over 1,400 hours within eight (8) to 12 (twelve) months per calendar year, as follows:

\_\_\_\_\_ month/year start      \_\_\_\_\_ month/year end      \_\_\_\_\_ Location

I certify that I am authorized to sign on behalf of \_\_\_\_\_  
Business name

\_\_\_\_\_  
Employer signature      \_\_\_\_\_  
Date

\_\_\_\_\_  
Printed name      \_\_\_\_\_  
Title

\_\_\_\_\_  
Contact phone no.

**You will need to make additional copies of this form if you have more than one employer listed on the Employment History page.**

# Town of Snowmass Village Employee Housing Sales Application

Applicant's name: \_\_\_\_\_

Co-Applicant's name: \_\_\_\_\_

## **OWNERSHIP OF OTHER PROPERTY**

\_\_\_\_\_ I/We do not own any residential property within the Roaring Fork Drainage to include the area between No Name to Rifle, Colorado.

\_\_\_\_\_ I/We do own residential property within the Roaring Fork Drainage included in the area between No Name to Rifle, Colorado.  
The address is \_\_\_\_\_.

The ownership is in the name of \_\_\_\_\_.

**I/We agree to sell the above specified residential property within 6 (six) months from the time of closing on the awarded housing unit.**

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Co-Applicant's Signature

---

## **NUMBER OF PERSONS REQUIRED PER BEDROOM**

\_\_\_\_\_ One person for a one (1) or a two (2) bedroom Condominium, Duplex or Townhome unit. **(One person is not eligible to purchase a single family home)**

\_\_\_\_\_ Two persons for a one (1) or a two (2) bedroom unit.

\_\_\_\_\_ Three persons for a two (2) or a three (3) bedroom unit.

\_\_\_\_\_ Four persons for a two (2), three (3) or four (4) bedroom unit.

\_\_\_\_\_ Five persons for a three (3), four (4) or five (5) bedroom unit.

The parent(s) or legal guardian(s) of a dependent(s) must submit a copy of legal documentation confirming that the applicant(s) have legal custody of the dependent(s) for 121 days or more within a calendar year.

\_\_\_\_\_  
Applicant's signature

\_\_\_\_\_  
Co-Applicant's signature

# Town of Snowmass Village Employee Housing Sales Application

Applicant's name: \_\_\_\_\_

Co-Applicant's name: \_\_\_\_\_

## **Acknowledgements**

\_\_\_\_\_  
Initials     Initials

Retirement - I/We confirm that we must work until I am/we are eligible to receive social security benefits.

\_\_\_\_\_  
Initials     Initials

Retirement - I/We acknowledge that I/we will work for at least ten (10) years before retiring regardless of the amount of time I/we have been working in Pitkin County or at the age I/we purchase my/our housing unit.

\_\_\_\_\_  
Initials     Initials

Requalification - I/we acknowledge that I/we will requalify biennially under the topics of employment, residency, income, net worth, ownership of other property and that I/we will complete and submit all required documentation.

\_\_\_\_\_  
Initials     Initials

Ownership of Other Property - I/we agree that I/we will not own any residential dwelling unit within the area named the Roaring Fork Drainage as defined in the Town of Snowmass Village Municipal Code Chapter 17.

\_\_\_\_\_  
Initials     Initials

Residency - I/We acknowledge that I/we must live in this housing unit as our primary residence eight (8) months per calendar year or I/we will be required to sell the housing unit.

---

## **Verification of True and Accurate Information**

I/We hereby verify that all information provided in this application is accurate and true. **I/We understand that I/we will be disqualified from this and all future lotteries with the Town of Snowmass Village For Sale Employee Housing Program if it is determined that any information is inaccurate or non-verifiable.** I/We shall be notified by the Town of Snowmass Village Housing Department in writing as to the subsequent disqualification and the reason(s) for the rejection.

\_\_\_\_\_  
Applicant's Signature Date

\_\_\_\_\_  
Co-Applicant's Signature Date



Town of Snowmass Village  
Employee Housing Sales Application

**Authorization to Obtain a Copy of Loan Application**

I/We give the authorization to the Town of Snowmass Village Housing Department to obtain a copy of my/our actual loan documents from my/our lender.

My/Our signature(s) below do(es) hereby authorize my/our lending institution \_\_\_\_\_ to furnish a copy of my/our completed loan application to the Town of Snowmass Village Housing Department.

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Signature and date

\_\_\_\_\_  
Printed name

\_\_\_\_\_  
Signature and date

# Town of Snowmass Village Employee Housing Sales Application

## NET WORTH APPLICATION

Applicant's Name: \_\_\_\_\_

Co-Applicant's Name: \_\_\_\_\_

ASSETS		LIABILITIES	
AMOUNT/VALUE	INSTITUTION	PAY OFF AMMOUNT	INSTITUTION
Cash in the Bank	1) _____	Bank Loans	18) _____
	2) _____		19) _____
	3) _____		20) _____
Stocks and Bonds	4) _____		
	5) _____		
LOCATION			
Real Estate	6) _____	Mortgage	21) _____
	7) _____		
YEAR/MAKE			
Automobiles	8) _____	Auto Loan	22) _____
	9) _____		23) _____
	10) _____		24) _____
INSTITUTION			
Life Insurance	11) _____	Credit Cards	25) _____
Retirement Accts (IRA, 401K)	12) _____		26) _____
	13) _____		27) _____
College Funds (529 Plan)	14) _____		28) _____
Other Assets	15) _____	Other Obligations	29) _____
Child Support/ Alimony	16) _____		
NAME OF BUSINESS			
Net Worth Of Business	17) _____	Child Support/ Alimony	30) _____
TOTAL ASSETS	_____	TOTAL LIABILITIES	_____

**FOR OFFICE USE ONLY**

Assets \_\_\_\_\_ minus Liabilities \_\_\_\_\_ minus Retirement/College Funds \_\_\_\_\_ equals Net Worth \_\_\_\_\_

**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).

**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.

<b>1a</b> Name shown on tax return. If a joint return, enter the name shown first.	<b>1b</b> First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
<b>2a</b> If a joint return, enter spouse's name shown on tax return.	<b>2b</b> Second social security number or individual taxpayer identification number if joint tax return
<b>3</b> Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	
<b>4</b> Previous address shown on the last return filed if different from line 3 (see instructions)	
<b>5</b> Customer file number (if applicable) (see instructions)	

**Note:** Effective July 2019, the IRS will mail tax transcript requests only to your address of record. See **What's New** under **Future Developments** on Page 2 for additional information.

**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. 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 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. 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.

|   /   /   |   /   /   |   /   /   |   /   /   |

**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:** This form must be received by IRS within 120 days of the signature date.

<input type="checkbox"/> <b>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.</b> See instructions.	Phone number of taxpayer on line 1a or 2a
▶ _____ <b>Signature</b> (see instructions)	_____ Date
▶ _____ <b>Title</b> (if line 1a above is a corporation, partnership, estate, or trust)	
▶ _____ <b>Spouse's signature</b>	_____ Date

**Sign Here**

Section references are to the Internal Revenue Code unless otherwise noted.

## Future Developments

For the latest information about Form 4506-T and its instructions, go to [www.irs.gov/form4506t](http://www.irs.gov/form4506t). Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

**What's New.** As part of its ongoing efforts to protect taxpayer data, the Internal Revenue Service announced that in July 2019, it will stop all third-party mailings of requested transcripts. After this date masked Tax Transcripts will only be mailed to the taxpayer's address of record.

If a third-party is unable to accept a Tax Transcript mailed to the taxpayer, they may either contract with an existing IVES participant or become an IVES participant themselves. For additional information about the IVES program, go to [www.irs.gov](http://www.irs.gov) and search IVES.

## General Instructions

**Caution:** Do not sign this form unless all applicable lines have been completed.

**Purpose of form.** Use Form 4506-T to request tax return information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

**Note:** If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

**Customer File Number.** The transcripts provided by the IRS have been modified to protect taxpayers' privacy. Transcripts only display partial personal information, such as the last four digits of the taxpayer's Social Security Number. Full financial and tax information, such as wages and taxable income, are shown on the transcript.

An optional Customer File Number field is available to use when requesting a transcript. This number will print on the transcript. See Line 5 instructions for specific requirements. The customer file number is an optional field and not required.

**Tip.** Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

**Automated transcript request.** 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.

**Where to file.** Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

## Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:

Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team Stop 6716 AUSC Austin, TX 73301	855-587-9604
Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	Internal Revenue Service RAIVS Team Stop 37106 Fresno, CA 93888	855-800-8105
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999	855-821-0094

## Chart for all other transcripts

If you lived in or your business was in:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Jersey, New Mexico, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Washington, West Virginia, Wisconsin, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, A.P.O. or F.P.O. address	Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409	855-298-1145
Maine, Massachusetts, New Hampshire, New York, Pennsylvania, Vermont	Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999	855-821-0094

**Line 1b.** Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

**Line 3.** Enter your current address. If you use a P.O. box, include it on this line.

**Line 4.** Enter the address shown on the last return filed if different from the address entered on line 3.

**Note:** If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party — Business.

**Line 5b.** Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number **should not** contain an SSN. Completion of this line is not required.

**Note.** If you use an SSN, name or combination of both, we will not input the information and the customer file number will reflect a generic entry of "9999999999" on the transcript.

**Line 6.** Enter only one tax form number per request.

**Signature and date.** Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.



You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

**Individuals.** Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

**Corporations.** Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester's right to receive the information.

**Partnerships.** Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

**All others.** See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

**Note:** If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

**Documentation.** For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

**Signature by a representative.** A representative can sign Form 4506-T for a taxpayer only if the taxpayer has specifically delegated this authority to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4506-T.

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form**, 10 min.; **Preparing the form**, 12 min.; and **Copying, assembling, and sending the form to the IRS**, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service  
Tax Forms and Publications Division  
1111 Constitution Ave. NW, IR-6526  
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.