



TRV Lender Tips

As an IRS Direct Designee, SIR features exceptional turn-around time for IRS Transcript Data. This relationship also affords us open communication with the Internal Revenue Service. As a result we have received useful tips on ordering transcripts. With the increased volume experienced by IRS for this information, they have instituted defined order policies that must be followed or orders may be rejected.

As part of our continuing efforts to provide you with the absolute best service, we are sharing our IRS Tax Transcript Lender Tips with you so you may experience the ultimate benefits to our service. Please be sure to share our Tips with all personnel involved in processing IRS Form 4506-T.

TIPS

- Form 4506-T must be completely filled out with all data including borrower's last name, firstname, social security number, required tax filing period and type of return needed (ie, 1040, w-2, 1099)
- If the consumer lived at a different address when they filed their taxes make sure that the address on Line 3 of the 4506 matches. To avoid any problems fill out both Line 3 and Line 4.
- All data including borrower signature must be completed or request will be returned. Also all data must be completely filled in BEFORE borrower signs and dates Form 4506-T. Borrower signature must be within 60 days of IRS receipt of request.
- LINE 5 of Form 4506-T MUST CONTAIN THE FOLLOWING:
Strategic Information Resources
155 Brookdale Drive
Springfield, Ma 01104
(413) 736-4511
SIRTAXVERI
- Under no circumstances may white out be used
- When ordering a business return (1065 or 1120), a title must be entered below the signature line. A Business EIN number must be provided, not a social security number. Providing a social on a business return will generate a 1040 transcript, not a 1065 or 1120.

INFORMATION ON 2009 DATA:

W-2 transcripts will be available after 8/1/10. Availability on all other transcripts is as follows based on type of filing:
Paper filed returns-transcripts available 6-8 weeks after filing
Electronic filed returns-transcripts available 3-4 weeks after filing