

Tax Transcript Authorization 4506-C

Tips for completing the IRS form to help ensure efficient review and processing

An **IRS 4506-C Tax Transcript Authorization** is required for financial underwriting for some cases. The form is sent to the IRS so tax records can be released to Corebridge. If the form is not filled out properly the IRS may reject it and require correct completion of another authorization form, which can lead to a delay in advancing the case to underwriting. Here are some tips for completing and submitting the form to help ensure efficient processing by the IRS.

General tips

Always use the latest pre-filled form available in Forms Depot.

- This form is pre-filled with important Corebridge Financial addresses and information, and is regularly updated to include the most recent and accurate information.
- In Forms Depot, you can find the form by searching for "4506." The form is named "**IVES Request for Transcript of Tax Return.**"

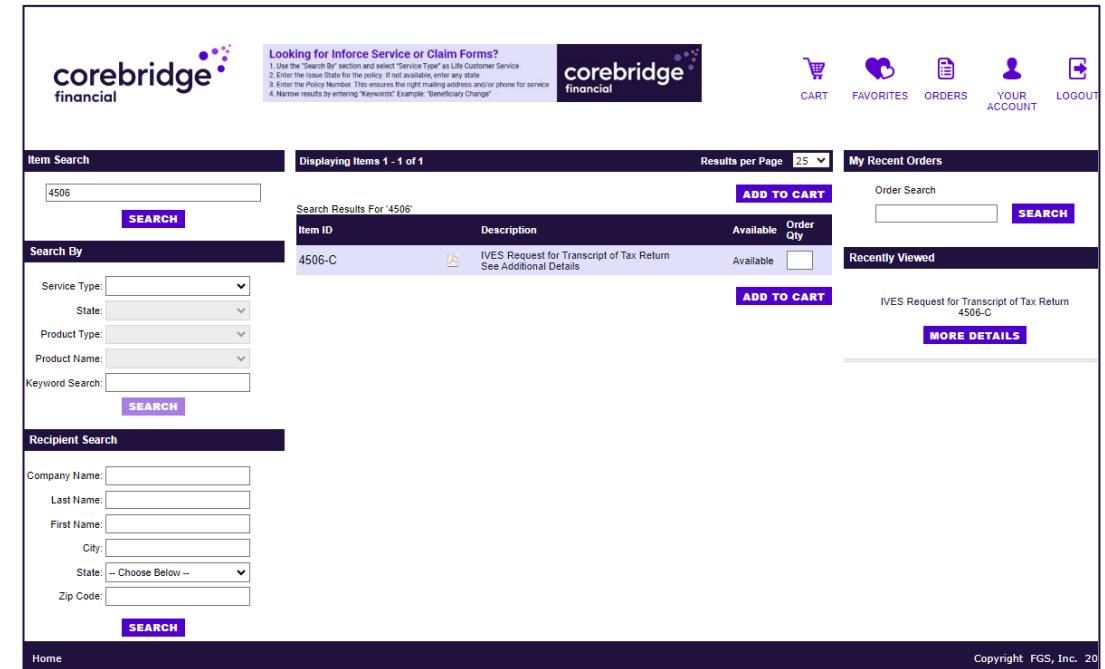
This form can signed electronically, but the IRS only accepts DocuSign.

- The DocuSign Certificate of Completion is required.
- The signature date on the form must be the same date on the DocuSign Certificate of Completion.

Ensure requested information is neatly included within the appropriate box on the form.

The IRS uses Optical Character Recognition (OCR) software when processing the form. To ensure proper reading by OCR, all information must be provided on the appropriate line and/or contained within the appropriate box of the form.

Do not edit or write over any lines or areas of the form. The IRS will reject the form if any lines have been edited or written over.



The screenshot shows the Corebridge Financial Forms Depot search interface. At the top, there is a navigation bar with the Corebridge Financial logo, a search bar, and links for CART, FAVORITES, ORDERS, YOUR ACCOUNT, and LOGOUT. Below the navigation bar, there is a search bar with the text '4506' entered. To the right of the search bar, it says 'Displaying Items 1 - 1 of 1' and 'Results per Page 25'. Below the search bar, there is a table with the following columns: Item ID, Description, Available, and Order Qty. The table contains one row with Item ID '4506-C', Description 'IVES Request for Transcript of Tax Return See Additional Details', Available 'Available', and Order Qty '0'. To the right of the table, there is a 'My Recent Orders' section with an 'Order Search' bar and a 'SEARCH' button. Below the 'My Recent Orders' section, there is a 'Recently Viewed' section with a link to 'IVES Request for Transcript of Tax Return 4506-C' and a 'MORE DETAILS' button. At the bottom of the page, there is a footer with the text 'Home' and 'Copyright FGS, Inc. 20'.

See pages 2 and 3 for a sample form and additional tips by section

Sample IRS form 4506-C with notes by section

1) Current Name

Ensure entries exactly match the name used for the most recent tax return.

Note: Also complete "Previous Name" fields if applicable.

2) Current Address

Ensure entries exactly match the address used for the most recent tax return.

Note: Also complete "Previous Address" fields if applicable.

3) Participant information

- Leave all 5a boxes pre-filled or blank
- Leave boxes 5b and 5c blank
- Leave all 5d boxes prefilled.

4) Transcript requested

Only list one tax form number. The most common form is 1040.

5) Return Transcript

If requesting a 1040 form, check the "Return Transcript" box.

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		2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers)		
I. First name	II. Middle Initial	III. Last name/BMF company name	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		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	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				
I. IVES participant name NCS TRV Processing		II. IVES participant ID number	III. SOR mailbox ID	
IV. Street address (including apt., room, or suite no.) P.O. Box 1089		v. City Hammonton	vi. State NJ	vii. ZIP code 08037
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 Parameds			II. Telephone number 212-223-3228	
III. Street address (including apt., room, or suite no.) 120-10 Queen's Blvd		IV. City Kew Gardens	v. State NY	vi. ZIP code 11415
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, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts				
a. Return Transcript <input checked="" type="checkbox"/>		b. Account Transcript <input type="checkbox"/>		c. Record of Account <input type="checkbox"/>

Continued on page 3

Sample IRS form 4506-C (continued)

6) Wage and Income transcript

Leave all boxes and fields in this section blank.

7) Year or period requested

- Only list the 2 most recent years when tax returns were filed.
- Date format is MM/DD/YYYY.
- For any tax year, always use 12/31 for the MM and DD entries. For example, for tax year 2023, enter as 12/31/2023.

8) **Signatory Attests box** must be checked for all requests.

9) **Signatory Confirms box** must be checked if the form is signed electronically.

Reminder, the IRS only accepts DocuSign with the Certificate of Completion.

10) **Print/Type name section** must be completed.

7. Wage and Income transcript (W-2, 1098-E, 1099-G, etc.)

a. Enter a max of three form numbers here; if no entry is made, all forms will be sent.

b. 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 Line 2a

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.

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

Form 4506-C was signed by an Authorized Representative Signatory confirms document was electronically signed

10 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

Form 4506-C was signed by an Authorized Representative 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.

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