

CIS TRV/4506T Ordering Tips



Follow these steps to ensure your 4506T order is processed accurately & timely!

1. [Use the request form available online](#). Line 5 is completed with the required IRS code.
2. Enter the borrower's **CURRENT** address on line 3, **EXACTLY** as it appears on the tax return.
3. If the borrower has moved since filing taxes, enter the address shown on the tax return on line 4 and use the current address on line 3 (address on line 4 must be an exact match to the tax return).
Always include **Apartment #, Unit #, Bsmt, Ln, Ave, Dr, St, Rd, Ph, Blvd, East, West, Fl #**.
Do not abbreviate if address is not abbreviated on tax return.
Include any previous address shown on the borrower's most recent tax return on line 4.
Enter only 1 address per line.
4. **Social Security Number must match** the most recent tax return. Double-check for accuracy.
5. Name(s) must be entered **EXACTLY** as it appears on the most recent tax return.
Primary tax filer must match line 1 of 4506T when ordering from a joint tax return.
If joint borrowers were single in previous years, name on line 2 must file separate 4506T.
6. Never use white-out, cross-outs or mix handwritten & typed data. Do not highlight form.
7. Ensure the form is **clearly legible**.
8. On line 9, use the date format **mm/dd/yyyy**.
9. **Attestation box above signature must be checked**.
10. The 4506T form **MUST** be **signed & dated**. Signature must be within 120 days of request date.
11. **Never reorder a 4506T with the same information that was previously rejected!** To learn why an IRS rejection occurred, the borrower can call 800.829.8374 and speak to an IRS representative.

For Business Returns: make sure Corp, LLC or Inc is included in the company name, when included in the company name on tax return. Show the EIN in xx-xxxxxxx format. Include title of business principal with signature. Business fiscal year must match tax date ordered.

Questions? [Contact CIS!](#)