

Completion Instructions for the 4506-T

IMPORTANT

In order to serve you as efficiently as possible, the below guidance is highly recommended to avoid any delay in processing Form 4506-T with the IRS.

- Complete the form in its entirety.
 - Typed forms are less likely to be rejected in comparison to handwritten forms. ClearPoint Funding has provided a modifiable version on our website for your use.
 - Item 1a: Must read exactly how the borrower filed on their returns.
 - Item 2: Spouse information must be completed if the borrowers filed jointly. Note that if the borrowers were unmarried at the time of filing, you must use the maiden names for proper processing with the IRS.
 - Item 3: Address must read exactly how the borrower filed on their returns, including unit or apartment numbers.
 - Item 4: If the borrower has moved since the last tax return was filed, line 4 must be completed reflecting the address used on the last return.
 - Line 6: Enter "1040" on line 6 unless CPF advises differently.
 - Boxes: The only boxes that should be checked are 6a, 6c and 8.
 - Line 9: For year or period requested, enter 2007, 2008 and 2009.
 - Borrower(s) must sign and date the form after it has been thoroughly completed.
 - Completed form must be included in your loan package.
 - NOTE: If the borrowers filed separately, the separate Form 4506-Ts are required for each individual.
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