

**DTF-664**

New York State Department of Taxation and Finance

**Tax Shelter Disclosure for
Material Advisors**

Tax Law Section 25(b)(1)

Material advisor's name			Employer identification number (EIN) or social security number	
Mailing address of material advisor (number and street or rural route)				
City, village, town, or post office		State	ZIP code	Telephone number ()
Material advisor's e-mail address			Aggregate material advisor's fees	

Attach a copy of the statement or return filed with the Internal Revenue Service (IRS) pursuant to section 6111 of the Internal Revenue Code (IRC) (currently federal Form 8918, *Material Advisor Disclosure Statement*). Also include all documentation submitted to the IRS in connection with the statement or return and mail to the address shown below. For more information, see the instructions on the back of this form.

Tax shelter informationType of business organization (mark an **X** in all that apply)

- ☐ Partnership (including a limited partnership)
☐ Trust
☐ S corporation
☐ Federal Schedule C or Schedule F activity
☐ Other (specify) _____

Enter the tax shelter's six-digit NAICS business code number (from the federal tax return) **Certification:** I certify that this disclosure and any attachments are to the best of my knowledge and belief true, correct, and complete.

Signature		Official title		Date		
Paid preparer use only	Signature of individual preparing this disclosure		Firm's name (or yours if self-employed)			
	Address		City	State	ZIP code	ID number




Mail Form DTF-664 and a copy of federal Form 8918 to:

**NYS DEPARTMENT OF TAXATION AND FINANCE
TAX SHELTER DISCLOSURE
PO BOX 22104
ALBANY NY 12201-2104**

If you are using a private delivery service, see *Private delivery services* below for more information.

Private delivery services — If you choose, you may use a private delivery service, instead of the U.S. Postal Service, to mail in your return and tax payment. However, if, at a later date, you need to establish the date you filed your return or paid your tax, you cannot use the date recorded by a private delivery service **unless** you used a delivery service that has been designated by the U.S. Secretary of the Treasury or the Commissioner of Taxation and Finance. (Currently designated delivery services are listed in Publication 55, *Designated Private Delivery Services*. See *Need help?* for information on obtaining forms and publications.) If you have used a designated private delivery service and need to establish the date you filed your return, contact that private delivery service for instructions on how to obtain written proof of the date your return was given to the delivery service for delivery. If you use **any** private delivery service, whether it is a designated service or not, send the forms covered by these instructions to: NYS Tax Department, Tax Shelter Disclosure, W A Harriman Campus, Albany NY 12227.

Need help?

-  **Internet access:** www.nystax.gov
(for information, forms, and publications)
-  **Fax-on-demand forms:** 1 800 748-3676
-  **Corporation Tax** Information Center: 1 888 698-2908
Personal Income Tax Information Center: 1 800 225-5829
From areas outside the U.S. and outside Canada: (518) 485-6800

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