

Mark Spain Team Short Sale Package



Dickason Law Group

Real Estate Attorneys



Dickason Law Group

Real Estate Attorneys

Dear Seller:

Thank you for selecting Dickason Law Group (DLG) to help close your real property transaction. DLG will assist in clearing title and processing the short sale submission for your existing loan(s). Below you will find our list of disclosures, necessary forms, a description of the role DLG will play in this transaction, and our expectations of the listing broker and seller.

Please note the following disclosures:

- **DLG does not represent the seller in this transaction.**
- **Do not construe any communication with DLG as legal, financial or accounting advice.**
- **The seller is advised to consult with an attorney, financial advisor, CPA, tax advisor and/or other professionals regarding this transaction and the risks of their specific situation.**
- **DLG will assist in clearing title and obtaining payoffs to prepare the property for closing.**
- **DLG is not negotiating on behalf of the seller or any other party in this transaction.**
- **The seller is aware that the information provided by seller or listing broker provided to DLG will be disclosed to seller's lenders. Seller hereby authorizes DLG to release such information.**
- **DLG does not guarantee that any short sale will be approved by the seller's lender.**
- **Please be aware that the seller's loan may be in default, and that default will continue until the lender has reached a satisfactory short sale agreement and has received payments in accordance with it. In many instances, collection calls from the seller's lender will not stop while the loan is in default.**
- **If a short sale approval is not received from the lender, please be aware that the loan will continue to be in default and the lender can exercise all remedies it has under the loan documents, including but not limited to foreclosure.**
- **DLG is not advising seller to default on your mortgage.**
- **If the seller's loan is currently scheduled for foreclosure sale, please be aware that DLG's efforts may not result in a stop of the foreclosure proceedings.**
- **DLG will not charge you an upfront fee for performing this service.**
- **DLG does have a fee that will be placed on the seller's side of the HUD and is taken out of the lenders proceeds of the sale.**
- **Please be aware that some lenders will not consider a short sale unless the seller is delinquent on the mortgage payments. Please check with the lender before submitting the short sale information packet to DLG.**
- **DLG is not associated with any government program.**
- **Even if seller accepts this offer to use our service, the lender may not agree to change the loan terms.**

1801 Peachtree St., Ste. 155
Atlanta, GA 30309
P: 770-407-5247
F: 678-922-7337

2845 Henderson Mill Rd.
Atlanta, GA 30341
P: 678-365-4146
F: 678-668-7251

104 Corporate Drive, Ste. A
Carrollton, GA 30117
P: 678-244-6246
F: 678-668-7251

11130 State Bridge Rd Suite 106B
Johns Creek, GA 30022
P: 678-244-6250
F: 678-922-7337

10 South Erwin Street
Cartersville GA 30120
P: 678-244-6247
F: 770-387-7449

2255 Cumberland Parkway
Bldg. 1200
Atlanta, GA 30339
P: 770-407-5247
F: 678-922-7337

****Free Parking****

- The seller may stop doing business with DLG at any time. The seller may accept or reject the offer of mortgage assistance we obtain from the lender (or servicer).
- For the purposes of this disclosure, all fees associated with this transaction will be disclosed on all settlement statements, including any preliminary documentation sent to the buyer's lender and the short selling lender. A disclosure of any fees must be made and will be provided on the HUD-1 Settlement Statement.

Agreed to and acknowledged by:

Seller's Signature

Date

Seller's Signature

Date

Seller's Phone number: _____

Seller's Email Address: _____

Property Address: _____

Seller's Forwarding Address: _____

Listing Agent's Signature:

Date

Listing Agent's Name: _____

Listing Agent's Phone Number: _____

Listing Agent's Email Address: _____

Sincerely,

Matthew A. Dickason
For the Firm:
Dickason Law Group

SHORT SALE PROCESS

The following checklist outlines the steps you, your agent, and DLG will follow to obtain the short sale approval and to close the transaction. Please feel free to use this checklist prior to submission of documents to DLG and keep the checklist handy as a convenient way to follow up with our office.

STEPS REQUIRED OF THE SELLER

- _____ (1) Contact your lender's Loss Mitigation Department
- _____ (2) Determine lender's willingness to accept a short sale
*If the answer is no, we cannot proceed further.

If the answer is yes, please obtain the following information:

First Mortgage Lender:

Lender Name: _____

Loss Mitigation Counselor Name: _____

Telephone: _____

Fax: _____

Email: _____

Second Mortgage Lender (if applicable):

Lender Name: _____

Loss Mitigation Counselor Name: _____

Telephone: _____

Fax: _____

Email: _____

Is there a Homeowners Association for the property?

Yes No

If yes, please provide contact information including name, phone number, address, and email address:

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Fax: _____

Email Address: _____

Any Other Details:

_____ (3) Gather information needed for the package to be submitted to the lender. A list of the items required for the package is attached. We will begin working on the Short Sale file once we receive a full complete package including all documents listed on page 7 of this packet.

_____ (4) Submit the completed package to DLG via email to newshortsalemst@dickasonlaw.com or via fax to 678-456-4617.

STEPS TO BE PERFORMED BY DLG

_____ (5) DLG will review your package and follow up to ensure all required items are received and upon receipt of all required documents, DLG will:

- obtain lien payoffs;
- prepare preliminary HUD-1 displaying net proceeds to lender(s); and
- submit the short sale package to lender(s).

_____ (6) DLG will then serve as liaison between lender(s) and seller.

_____ (7) DLG will update seller regularly and notify all interested parties upon receipt of approval from lender(s).

_____ (8) If the approval from lender(s) is acceptable to seller, DLG will prepare for final settlement.

_____ (9) Dickason Law Group prefers to act as the closing attorney for the sale of your property..

IMPORTANT INFORMATION (Check and fill in the appropriate response.)

Have you received a Notice of Foreclosure from any of your lenders or their foreclosing attorneys?

Yes No

How many mortgages do you have on this property?

1 mortgage _____; 2 mortgages _____; 3 or more mortgages _____

Are you delinquent on any of the above mentioned mortgages?

Yes No

If yes, how many months are you delinquent? _____

Are you delinquent on your property taxes?

Yes No

Are you delinquent on your homeowners' association dues?

Yes No Not applicable

If yes, please provide details and attach copies of such delinquency:

Do you have any judgments and/or liens (ex. credit card lawsuits, garnishments, IRS liens, GA income tax liens) against yourself or your property?

Yes No

If yes, please provide details and attach copies of such judgment or lien:

Are you currently in a bankruptcy proceeding or have you been previously discharged from bankruptcy or planning on filing for bankruptcy?

Yes No

If yes, please provide details:

Are you currently in a divorce proceeding or contemplating filing for divorce?

Yes No

If yes, please provide details:

Are you the property owner?

Yes No

If no, please provide details:

If no, please provide probate and court documents showing ownership.

List everyone who is on the mortgage:

The Borrower's Authorization (page 8 of Packet) needs to be completed by EVERYONE that is on the mortgage.

List everyone who is on the security deed:

Anyone on the Security Deed and not on the Mortgage will need to agree to sign a Quit Claim Deed.

Are you currently occupying (living in) the property?

Yes No

Are you currently occupying (living in) the property?

Yes No

If no,

Is the property being rented? _____

If the property is being rented, please provide relevant information.

Is the property vacant? _____

Is the property being maintained? _____

Please provide any further and relevant information:

Are all owners of the property alive? Are all debtors associated with the property alive?

Yes No

If no, please provide details:

DOCUMENTS REQUIRED FROM SELLER

***Please Note: While we will accept a partial package in order to get your file started with DLG, we have a higher approval success rate with a full package. To keep the file active with the lender, the bank statements and pays stubs are required to be updated in their system every 30 days. The loan number is required to be written on the top of all pages of the short sale submittal package. Completed packages should be emailed to newshortsalest@dickasonlaw.com or faxed to 678-456-4617.

All Seller's (On Mortgage) Required Documents (At Time of Listings):

Please Check Box If Included In Submittal Package

- Lender Required Forms (your lender will specify)
- Authorization to Release Information (included in this packet)
- HOA Information (if applicable)
- 60 Days of Most Recent Pay Stubs (required to be resubmitted every 30 days)
- Last Two Monthly Mortgage Statements
- Last Two Years Tax Returns and W - 2's (ALL PAGES OF TAX RETURNS REQUIRED)
- Last Two Months (current month and previous month) of ALL pages (front and back) of Bank Statements (required to be resubmitted every 30 days)
- Last Two Months (current month and previous month) of Bank Statements (required to be resubmitted every 30 days)
- List of any liquid assets over \$2,500 (if applicable)
- Repair Work Plan and Cost Estimate from Contractor (if applicable)
- Hardship Letter (See Hardship Letter example at the end of this packet)
- Hardship Documentation such as Divorce Decree Clear copy of all sellers' drivers' licenses
- Hardship Documentation such as Divorce Decree
- Clear copy of all sellers' drivers' licenses
- IRS 4506T-EZ (included in this packet)
- Affidavit of arm's length transaction (included in this packet)
- Completed Seller financial worksheet (included in this packet)

Agent Required Documents:

Please Check Box If Included In Submittal Package

- Fully Executed Sales Contract with addendums (includes all parties' signatures)
- Buyer's Loan Approval letter (if available)
- Funds to Close letter (if available)
- Listing Contract
- MLS Sheet showing previous listing activity (from listing agent if available)
- Payoff Statements on all mortgages (obtained by DLG)
- Letter describing relationship between buyer, seller, and realtor (if applicable)
- Brokers Price Opinion, CMA, or any other property valuation documentation (if available)
- Lender Required Agent Forms (if applicable)

BORROWER'S AUTHORIZATION TO RELEASE INFORMATION
(To Be Completed By EVERYONE That Is On The Mortgage)

This letter will serve as authorization for release of information to **Dickason Law Group/Matthew A. Dickason P.C. and any of its employees and agents acting on its behalf** to obtain any and all information associated with the above reference loan(s) and homeowners association accounts, balances and debts owed. Please furnish any and all pertinent information to them as they may require. A photocopy of this authorization bearing the signatures of the undersigned may be deemed the equivalent of the original.

Closing Attorney: Matthew A. Dickason P.C. / Dickason Law Group

1801 Peachtree Street, Suite 155, Atlanta, GA 30309

Tax ID Number: 42-1727612

Contact Names: All agents of Dickason Law Group including Betty Maddox, Matt Dickason, Sunni Curl, Melissa Samaniego, Amber Satterfield, Zach Wachs, Mona Kilgus, Gina Rogusky, and Ashley Blackstone. All agents of Keller Williams Realty – The Mark Spain Team including Lisa Wilson.

Date: _____

Short Sale Property Address: _____

Lender 1st: _____ Loan # 1st: _____

Lender 2nd: _____ Loan # 2nd: _____

Borrower 1 Name: _____ Borrower 2 Name: _____

Borrower 1 SSN#: _____ Borrower 2 SSN#: _____

Borrower 1 Email Address: _____ Borrower 2 Email Address: _____

Borrower 1 Date of Birth: _____ Borrower 2 Date of Birth: _____

Borrower 1 Phone Number: _____ Borrower 2 Phone Number: _____

Borrower 1 Current Address: _____ Borrower 2 Current Address: _____

Home Owners Association contact information including name, phone number, address, and email address:

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Fax: _____

Email Address: _____

Real Estate Agent: _____

Real Estate Agent Email Address: _____

Real Estate Agent Phone Number: _____

Borrower 1 Signature

Borrower 2 Signature

Borrower Name

Borrower Name

AFFIDAVIT OF "ARM'S LENGTH TRANSACTION"

Pursuant to a Purchase and Sales Agreement ("Agreement"), the parties identified below as "Seller(s)" and "Buyer(s)," respectively, are involved in a real estate transaction whereby the real property commonly known as _____ ("Property") will be sold by Seller(s) to Buyer(s).

_____ ("Lender") holds a security deed against the Property. In order to complete the sale of the Property, Seller(s) have asked Lender to discount the total amount owed on the loan which is secured by the security deed. Lender, in consideration for the representations made below by Seller(s), Buyer(s), and their respective agents, agrees to a short sale on the express condition that Seller(s), Buyers, and their respective agents each truthfully represents, affirms, and states as follows:

1. The purchase and sale transaction reflected in the Agreement is an "Arm's Length Transaction," meaning that the transaction has been negotiated by unrelated parties, each of whom is acting in his or her own self-interest, and that the sale price is based on fair market value of the Property. With respect to those persons signing this affidavit as an agent for Seller(s), Buyer(s), or both, those agents are acting in the best interests of their respective principal(s).
2. No Buyer or agent of Buyer(s) is a family member or business associate of the Seller(s) or the borrower(s) or the mortgagee(s).
3. No Buyer or agent of Buyer(s) shares a business interest with the Seller(s) or the borrower(s) or the mortgagee(s).
4. There are no hidden terms or hidden agreements or special understandings between the Seller(s) and the Buyer(s) or among their respective agents which are not reflected in the Agreement or the escrow instructions associated with this transaction.
5. There is no agreement, whether oral, written, or implied, between the Seller(s) and the Buyers and/or their respective agents which allows the Seller(s) to remain in the property as tenants or to regain ownership of the Property at any time after the consummation of this sale transaction.
6. The Seller(s) shall not receive any proceeds from the sale of the Property reflected in the Agreement, unless otherwise approved by lender(s) and disclosed on final settlement statement.
7. No agent of either the Seller(s) or the Buyer(s) shall receive any proceeds from this transaction except as is reflected in the final estimated closing statement which shall be provided to Lender for approval prior to the close of escrow.
8. Each signatory to this Affidavit expressly acknowledges that Lender is relying upon the representations made herein as consideration for discounting the payoff on the loan(s) which is/are secured by a security deed encumbering the Property.
9. Each signatory to this Affidavit expressly acknowledges that any misrepresentation made by him or her may subject him or her to civil liability.

I declare under penalty of perjury under the laws of the State of Georgia that all statements made in this Affidavit are true and correct. Additionally, I/We fully understand that it is a Federal crime punishable by fine or imprisonment, or both, to knowingly and willfully make any false statements concerning any of the above facts as applicable under the provisions of Title 18, United States Code, Section 1001, et seq.

Date Seller Date Seller

Date Buyer Date Buyer

Listing Agent Listing Agent

Company Company



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CDPE Homeowner Financial Worksheet

Borrower Name _____

Co-Borrower Name _____

1st Loan Number _____

2nd Loan Number _____

INCOME—TAKE HOME PAY

	Borrower	CO-Borrower	TOTAL
Primary Job			
Misc. Income Overtime			
Part-time Job (net)			
Retirement-Military			
Retirement-Civil Service			
Support/Alimony			
Social Security			
Room & Board / Rent			
TOTAL NET INCOME			

How often Is Borrower paid? Every Week Every 2 Weeks Twice A Month Once A Month

How often is Co-Borrower paid? Every Week Every 2 Weeks Twice A Month Once A Month

EXPENSES:

	MONTHLY PAYMENT	BALANCE	NAME OF CREDITOR
Home Mortgage			
2nd Home Mortgage			
Auto Loan			
Auto Loan			
Creditor			
Creditor			
Creditor			
Creditor			
Creditor			
Creditor			
Creditor			
Student Loan			
Alimony/Support			
Child Care			
IRS			
Chapter 13			
Electricity			
Heating Fuel			
Water & Sewer			
Telephone			
Cable TV			
Auto Insurance			
Health Insurance			
Life Insurance			
Medical/Dental Expenses			

Homeowner's Insurance		
Real Estate Tax		
Personal Property Tax		
Groceries		
School Lunches		
Transportation, Parking, Tolls		
Clothing		
Dry Cleaning/Laundry		
Cell Phone		
Internet Service		
Homeowner's Association Dues		
Recreation / Spending Money		
Charitable Donations		
Other Expenses		
TOTAL MONTHLY EXPENSES		

A. Total Monthly Income: _____

B. Total Monthly Expenses: _____

C. Net Income / Loss: _____

Balance In 401K: _____ Cash Value of Stocks: _____

Balance In IRA: _____ Other Valuables to be sold: _____

Cash on Hand: _____ Other Misc. Assets: _____

I/We have described my/our financial condition in the enclosed Financial Status Report and certify that ail information, as well as all Attachments, Is true, accurate and correct to the best of my/our knowledge. I/we understand that submission of this Information In no way obligates my lender, servicer. Veterans Affairs, FHA/ HUD, the investor, the mortgage insurers, (Agent) or (BROKERAGE) to provide assistance to me or stop the foreclosure process.

I/We hereby authorize my/our lender, servicer, Veterans Affairs, FHA/ HUD, the Investor or the Mortgage Insurers to:

1. Order a credit report from any credit reporting agency;
2. Order a title search from any title agency; and/or
3. Verify the accuracy of the information contained in this Financial Status Report, Including without limitation, any current or previous employment information

I/We agree that I/we will notify the AGENT and BROKERAGE mentioned above, my lender, Veterans Affairs, FHA/ HUD, the investor, or the Mortgage Insurers Immediately of any material change In the financial information that I/We have provided herein. If I/we fall to do so, or if It Is determined that the financial information provided herein has been misrepresented by me, and lender, servicer, Veterans Affairs, FHA/ HUD, the investor or the mortgage insurers makes decisions which would not have been made had the true facts been known, then (1) I shall be liable for all costs (fees) Incurred or damages suffered by lender, servicer, Veterans Affairs, FHA/ HUD, the investor, the mortgage insurers or AGENT and BROKERAGE above, and (2) lender, servicer, Veterans Affairs, FHA/ HUD, the investor, the mortgage Insurers and/or AGENT shall have the right. In Its sole discretion, to terminate any arrangement or agreement that has been extended to me based, in whole or in part, on the inaccurate or incomplete information that I/we have provided.

Print Borrower's Name _____ Date _____ Borrower's Signature _____

Print Co-Borrower's Name _____ Date _____ Co-Borrower's Signature _____

This outline will help you prepare your hardship letter. The sample answers are to assist you NOT to just be copied. Your hardship letter should only contain facts. Just be honest. Your goal is to explain to your Lender why you can no longer make the payments for your property.

TO: Wells Fargo

FR: Paul and Suzie Helpus

RE: 1234 Lost Value Ave. Poinciana FL 34759

LN#: 34578903

First Paragraph-Explain what you want

- We are requesting that you approve us for a short sale of our loan with your Company.
- We are no longer able to make the payments and have been trying hard to sell the property.
- We love our home but due to circumstances beyond our control we are no longer able to pay for it.
- Please accept this short sale offer and relieve us of any future liability. We are requesting a "Full Waiver of Deficiency"

Secondly, describe your hardship

- What led to your current financial problems and caused you to miss mortgage payments?
- What caused your hardship?
- Did you lose your job?
- Did your current job require a transfer?
- Illness?
- Death?

Be very specific. Remember you are trying to get your Lender to accept a loss. Be honest and be thorough.

Then describe what you have tried to do to overcome your hardship.

- Have you been to counseling?
- Have you been job hunting?
- Are you cutting back on your expenses?
- Have you been making mortgage payments on your credit cards?

Briefly outline your current situation.

- You have a new job but are making less money.
- You had to move due to divorce, job, children etc....

Provide your contact information.

- Let them know they are free to contact you if they have any questions BUT reiterate that they should contact your Broker.

Finally, sign and date the letter.

- All Borrowers must sign.



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PROPERTY EXPERT®

Sample Hardship Letter

Date:

Lender:

Attn: Loss Mitigation

RE: HARDSHIP LETTER—

ACCOUNT NUMBER

To Whom It May Concern:

I purchased my home in 2005 and we had the income at the time to support the mortgage.

In early 2006, my mother was diagnosed with Alzheimer's Disease and needed to be put in a nursing home, which was very expensive. She later passed away in November 2006. At this time, my husband lost his job and has since taken a significance cut in pay. We love our home and do not want to lose it but we have come to terms with the fact that we cannot afford to keep it.

This left me with the financial burden of paying the mortgage. I make \$35,000 annually and I have exhausted all of my savings, IRA's and my children's college funds. I used to keep the mortgage payments current until May 2007.

In May 2009, I was no longer able to make payments and inquired about partial payments, payment plans, and refinance; I was denied on all accounts. In July 2009, I put the house up for sale with (Your Agent's Name and Brokerage Firm) who specializes in pre-foreclosure properties and short sales.

My financial situation cannot sustain a home mortgage of nearly \$2800 per month. I want to sell the home, avoid foreclosure and salvage my credit. I know that a foreclosure on my record will affect me for years to come, I would ask that you please assist me in avoiding this.

Since the house has been on the market this is the only offer that we have received. Please accept this offer as payment in full. My agent will continue to market the house.

I deeply appreciate your help and understanding in this matter. If you have any questions, or need anything further from me, please contact my agent or me personally.

Sincerely,

Jane Seller

Request for Transcript of Tax Return

OMB No. 1545-1872

▶ Request may be rejected if the form is incomplete or illegible.

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return**. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number or individual taxpayer identification number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)	
4 Previous address shown on the last return filed if different from line 3 (see instructions)	
5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.	

Caution. If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your IRS transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

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. ▶ _____

a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days

b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days

c Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2010, filed in 2011, will not be available from the IRS until 2012. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days

Caution. If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. _____

Check this box if you have notified the IRS or the IRS has notified you that one of the years for which you are requesting a transcript involved **identity theft** on your federal tax return

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 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, **either** husband or wife must sign. If signed by a corporate officer, partner, 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-T on behalf of the taxpayer. **Note.** For transcripts being sent to a third party, this form must be received within 120 days of the signature date.

	Phone number of taxpayer on line 1a or 2a
▶ Signature (see instructions)	Date
▶ Title (if line 1a above is a corporation, partnership, estate, or trust)	
▶ Spouse's signature	Date

Sign Here

Section references are to the Internal Revenue Code unless otherwise noted.

What's New

The IRS has created a page on IRS.gov for information about Form 4506-T at www.irs.gov/form4506. Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

General Instructions

CAUTION. Do not sign this form unless all applicable lines have been completed.

Purpose of form. Use Form 4506-T to request tax return information. You can also designate (on line 5) a third party to receive the information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

Note. If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

Tip. Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

Where to file. Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

Automated transcript request. You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946.

Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:

Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301
Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	512-460-2272

Alaska, Arizona, Arkansas, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888
Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	559-456-5876

Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia	RAIVS Team Stop 6705 P-6 Kansas City, MO 64999
	816-292-6102

Chart for all other transcripts

If you lived in or your business was in:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address

Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin

Mail or fax to the "Internal Revenue Service" at:

RAIVS Team
P.O. Box 9941
Mail Stop 6734
Ogden, UT 84409

801-620-6922

RAIVS Team
P.O. Box 145500
Stop 2800 F
Cincinnati, OH 45250

859-669-3592

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P. O. box, include it on this line.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note. If the address on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address.

Line 6. Enter only one tax form number per request.

Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.

Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer.

Partnerships. Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Privacy Act and Paperwork Reduction Act

Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form**, 10 min.; **Preparing the form**, 12 min.; and **Copying, assembling, and sending the form to the IRS**, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:M:S
1111 Constitution Ave. NW, IR-6526
Washington, DC 20224

Do not send the form to this address. Instead, see *Where to file* on this page.



Dickason Law Group

Real Estate Attorneys

Buyer's Information Sheet

Property Address
Being Purchased: _____

Buyer's Name: _____

Buyer's Address: _____

Buyer's Phone Number: _____

Buyer's Social Security Number: _____

Buyer's DOB: _____

Buyer's Email Address: _____

Buyer's Tax ID Number (If a Business Entity): _____

Buyer's Real Estate Agent Contact Information

Name: _____

Company: _____

Address: _____

Phone Number: _____

Email Address: _____

1801 Peachtree St., Ste. 155
Atlanta, GA 30309
P: 770-407-5247
F: 678-922-7337
****Free Parking****

2845 Henderson Mill Rd.
Atlanta, GA 30341
P: 678-365-4146
F: 678-668-7251

104 Corporate Drive, Ste. A
Carrollton, GA 30117
P: 678-244-6246
F: 678-668-7251

11130 State Bridge Rd Suite 106B
Johns Creek, GA 30022
P: 678-244-6250
F: 678-922-7337

10 South Erwin Street
Cartersville GA 30120
P: 678-244-6247
F: 770-387-7449

2255 Cumberland Parkway
Bldg. 1200
Atlanta, GA 30339
P: 770-407-5247
F: 678-922-7337