



Date: February 12, 2016

Announcement #2016-05

Topic: Update Form 4506-T - Signatory Attestation Clause

PBM Announcement

Source: PBM Empower Support

Distribution: All PBM Employees

PBM Staff,

The 4506-T form has been updated to include the **Signatory Attestation Clause**. It is very important that the borrower checks the box for confirmation, at time of signing, otherwise the form will not be processed. The form is effective March 1, 2016, however begin utilizing the form now.

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, at least one spouse must sign. 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-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.

Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T. See instructions. Phone number of taxpayer on line 1a or 2a

Sign Here	Signature (see instructions)	Date
	Title (if line 1a above is a corporation, partnership, estate, or trust)	
	Spouse's signature	Date

1.) **Wholesale Website**

The revised 4506-T form has been updated to the following location under the Forms folder:
<http://www.pbmwholesale.com/whlsforms.asp> .

2.) **Intranet**

The revised Interactive 4506-T forms have been updated to the following location:

Dataverify -

<http://provident/library/docs/pbm/Policy%20and%20Procedures%20Manual/Forms/IRS%204506T%20DataVerify.pdf>

Inco -

<http://provident/library/docs/pbm/Policy%20and%20Procedures%20Manual/Forms/IRS%204506T%20IncoCheck.pdf>

3.) **Retail Portal -** The document can be printed from the **'Documents' & 'IRS 4506-T'** sections.

Please contact PBM Empower Support with any questions.