Rowland Hall
EXTRAORDINARY LEARNING

Dear Parent,

Thank you for your interest in Rowland Hall.

Enclosed you will find information regarding financial aid for the 2010-2011 school year including all application materials. Please review the information carefully in its entirety.

You will note that you need to submit all required information and supporting documentation to SSS in Randolph, MA by **March 1**, 2010. Any documents inadvertently mailed to Rowland Hall will be forwarded to SSS for processing.

In order to receive full consideration for financial aid, please read over the instructions carefully to ensure that you complete your application by the deadline.

Please feel free to contact me directly regarding any questions or concerns you may have regarding financial aid. The Financial Aid Committee maintains a policy of strict confidentiality regarding all families' financial aid applications and status. For this reason I encourage you to contact me directly at leenuckolls@rowlandhall.org or (801) 924-5957. For your privacy, I discourage the use of fax.

I look forward to working with you.

Best,

Lee

Lee Nuckolls
Director of Financial Aid

Rowland Hall

EXTRAORDINARY LEARNING

Financial Aid for the 2010-2011 Academic Year

Application Instructions

The Rowland Hall Financial Aid Committee requires the completion and submission of specific documents to assist the school in the process of making financial aid award decisions. Please be certain the following steps are completed by **March 1, 2010**. Please contact Lee Nuckolls, Director of Financial Aid, at (801) 924-5957 if you have any questions.

Step 1:

Complete your 2009 Federal Tax Return.

Step 2:

Complete and submit the Parents Financial Statement (PFS) online at sss.nais.org/parents/. The SSS code for Rowland Hall is 6165. The PFS Helpline is (800) 344-8328.

Step 3:

Complete and submit the following to School & Student Services (SSS), P.O. Box 449, Randolph, MA 02368-0449.

- PFS Documentation Cover Sheet.
- Rowland Hall Financial Aid Application Form.
- Final 2009 federal tax returns with <u>all</u> supporting schedules.
- W-2's.
- SSS Business/Farm statement (if applicable).
- IRS Form 4506-T. Complete lines 1-4 and sign, but do not date this form.

Please keep copies for your records.

Financial aid will not be determined until the Rowland Hall Financial Aid Application Form, complete federal tax returns, W-2's, form 4506-T, the PFS assessment, and the Business/Farm Statement (if applicable) have all been received <u>*for both parents*</u>. Priority will be given to those complete files received by March 1, 2010.

The Financial Aid Committee will review all applications completed by the deadline in order to mail award letters in late April.

The Financial Aid Committee maintains a policy of strict confidentiality concerning all inquiries, applications, and awards. We ask that families applying for and/or receiving aid maintain this policy.

Frequently Asked Questions

What is the Purpose of Financial Aid?

Rowland Hall offers need-based financial aid for tuition to families of students in grades one through twelve without regard to race, religion, physical ability, gender, sexual orientation, or national or ethnic origin. There is limited financial aid available to families of kindergarteners. The program exists to help assure that any admitted student will have the opportunity to attend the school. While meeting the full demonstrated need of all families who apply is rarely possible, we do our best to make a Rowland Hall education affordable to the greatest number of families.

How is Financial Aid Awarded?

Financial aid awards reflect our belief that parents should finance their child's education to the extent that they are able. Financial aid allocations are based on the funds available and the demonstrated need of the families qualifying for aid.

The Financial Aid Committee uses the Parents' Financial Statement (PFS) from the School and Student Services for Financial Aid (SSS) from Pittsburgh, PA. As supporting documentation we require the most recent tax forms, W-2's, the SSS Business/Farm Statement and any reported extenuating circumstances to help determine each family's need for financial aid.

I never do my taxes until close to the April 15 deadline. How will this affect my financial aid award?

You will need to complete your taxes or a draft of your federal taxes early enough to meet the March 1 deadline in order to receive full consideration for financial aid. If your federal taxes are not finalized by March 1, please submit a draft of your taxes with "draft" noted. Then send in your final federal taxes when they are complete.

Do I have to apply for financial aid before I know my child has been admitted?

Yes. The admissions application process and the financial aid application process happen simultaneously.

Does applying for financial aid influence the admission decision?

No. The Admissions Committee and the Financial Aid Committee are completely separate. Rowland Hall admits students based on academic merit, assessments, and personal qualities and determines need according to family financial circumstances. The names of families applying for financial aid will only be shared with the Director of Admission for logistical purposes.

What if I have more than one student at Rowland Hall?

Parents need file only one Parents' Financial Statement for all children at the school.

Is financial aid automatically renewed each year?

No. We require that families receiving financial aid reapply each year. However, as long as the student makes a solid effort to do well and remains a good citizen of the school, financial aid will be renewed each year according to demonstrated need. Changes in such things as income, family status, or the number of children attending tuition-charging institutions may result in increases or decreases in an award.

What is SSS and is my personal information secure?

The School and Student Services program is owned by NAIS and used by more than 2,400 K-12 private schools and other organizations to help determine a family's ability to pay school costs. The service and process helps ensure that all schools use a consistent assessment and an objective procedure to evaluate your financial aid application. More information on SSS Information Security can be found at sss.nais.org/schools/CompAssist/content.cfm?ItemNumber=152194&navItemNumber=152124.

I am divorced, or no longer living with my child's other parent. Will Rowland Hall still expect that person to be part of my application for financial aid?

Yes. We require that both natural parents and their current domestic partners, if any, complete a separate financial statement. It is the responsibility of the custodial parent to ask the non-custodial parent to fill out this form. An extra form for the non-custodial parent may be obtained from the Director of Financial Aid or downloaded from the Rowland Hall website.

Waiving the requirement of the non-custodial parent will be considered under the following circumstances:

1. Documented information is provided that states the location of non-custodial parent is unknown; or

2. Documented information is provided that the non-custodial parent has given no support for at least two years.

Documentation will be accepted from a doctor, lawyer, minister, or any such person outside the immediate family.

I am remarried and/or live with someone else. Will that person's financial circumstances be considered in the financial aid allocation for my child?

Yes. The addition of another adult into a household generally changes its financial picture. We will ask that you complete the PFS together.

My spouse does not work. How will that affect my financial aid award?

If your spouse chooses not to work, then an annual salary based upon a forty-hour position paying a minimum wage will be added to the income calculations for evaluation. There are circumstances such as caring for a preschool child or an elderly parent that would exempt a family from this policy. Each application and circumstance is evaluated individually.

How and when will I be notified of my award?

Families applying for financial aid will receive a letter from the Financial Aid Committee informing them of their award. Letters are usually mailed in late April to families who submitted a complete application by March 1.

What payment plans are available?

Rowland Hall offers three payment options: a one-time payment, a two-time payment, and nine monthly payments. For further information, contact Carol Frymire, Student Billing Manager, at (801) 924-2959.

Tuition and Fees for 2010-2011

Please see the "2009-2010 Tuition and Fees" at www.rowlandhall.org for a full understanding of the costs associated with a Rowland Hall education. The Board of Trustees sets tuition for each year, and annual increases are expected. The 2010-2011 Tuition and Fee Schedule will be included with the financial aid award letter.

What about Upper School Laptops?

If the purchase of a laptop is a hardship for your family, please contact Lee Nuckolls. Arrangements can be made with the Student Billing Manager for an interest-free loan.

I still have questions. Who can I call?

For further information or questions please contact Lee Nuckolls, Director of Financial Aid, at (801) 924-5957; or the PFS Helpline at (800) 344-8328.

Rowland Hall

EXTRAORDINARY LEARNING

Financial Aid Application
for the 2010-2011 Academic Year

Student Applicant Information

List children enrolled in or applying to Rowland Hall along with a specific dollar amount for each child in Kindergarten through 12th grade that you are requesting.

Student A: ____Grade in September 09:____

Tuition Assistance Amount Requested: $___________________ (note a specific dollar amount)

Student B: ____Grade in September 09:____

Tuition Assistance Amount Requested: $ ___________________ (note a specific dollar amount)

Student C: ____Grade in September 09:____

Tuition Assistance Amount Requested: $____________________ (note a specific dollar amount)

Parent or Guardian Information

Parent/Guardian A

Name ____________________________

Email ____________________________

Phone ____________________________

Parent/Guardian B

Name ___________________________

Email ___________________________

Phone ___________________________

If student(s) is (are) currently enrolled, what date did you submit the enrollment contract(s) and reservation deposit(s) to the Business Office? _________________

The enrollment reservation deposit for families applying for financial aid will be $850 rather than the standard deposit amount of $1,700. In order for returning students to be considered for financial aid, an initial enrollment contract and deposit must be submitted by the deadline. Your deposit is refundable if your aid request is not met.

What role, if any, do grandparent(s) or godparent(s) take in the financial support of school for the student(s)?
____

Does Parent/Guardian A or Parent/Guardian B own a business or farm (yes/no)? ___________________________

If your student is awarded a named scholarship, do you give the school permission to share your student's name with the foundation or donor of the scholarship (yes/no)? *Your answer will in no way affect the outcome of the financial aid. We will simply let the foundation or donor know that the student wishes not to be named.* _____________________

Special Circumstances

Please list and quantify any additional special circumstances the Financial Aid Committee should consider. Feel free to submit a separate sheet for this information.

____

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Attachments

The application for financial aid will be considered complete when all the following items are received by SSS for both parents:

- PFS Documentation Cover Sheet.
- Final 2009 federal tax returns with <u>all</u> supporting schedules. *If tax return is not complete by March 1, include draft tax returns with "draft" noted and forward the final tax returns before the end of April.*
- 2009 W-2's.
- SSS Business/Farm statement (if applicable).
- Copy of student(s) federal tax return and supporting schedules if applicable. *If tax return is not complete by March 1, include draft tax returns with "draft" noted and forward the final tax returns before the end of April.*
- IRS Form 4506-T. Complete lines 1-4 and sign, but do not date this form.

Parents/Guardians Certification and Authorization

We declare that the information reported on this form and all supporting documentation, to the best of our knowledge and belief, **is true, correct, and complete**. Rowland Hall has our permission to verify the information reported.

____ __________

Signature of Parent/Guardian Date

____ __________

Signature of Parent/Guardian Date

Mail all information to School & Student Services (SSS), P.O. Box 449, Randolph, MA 02368-0449.

SCHOOL & STUDENT SERVICES BY NAIS
PFS
PO Box 449, Randolph, MA 02368-0449
sss.nais.org

Parents' Financial Statement (PFS)
2010–2011 Academic Year
Helpline: 800-344-8328
Email: sss@nais.org

Required Personal / Financial Information Worksheet

Having the necessary personal and financial information ready when you begin the PFS process will shorten the time it takes to complete the form and make the process smoother. Before you begin, gather the relevant items listed below. In addition, you should check with the school(s) to which you will be applying to determine if they have any additional forms they require..

Student Applicant Information

- ❑ Social Security Number for each applicant
- ❑ Cost of camps and lessons
- ❑ Student asset information
- ❑ Annual student earnings

Parent Income Information

- ❑ Tax returns, W-2 forms
- ❑ Bank statements
- ❑ Dividend statements
- ❑ Self-employment information (Business/Farm)

Parent Non-taxable Income Information

- ❑ Payments to tax deferred pensions and savings plans
- ❑ Pre-tax contributions or employer provided untaxed income from fringe benefit plans (cafeteria or 125 plans)
- ❑ Cash support received from relatives and friends
- ❑ Household financial contributions paid by other non-dependent household members
- ❑ Dollar value of housing, food, and other household expenses paid to you as a member of the clergy, military, or other occupation
- ❑ Income from tax-exempt investments
- ❑ IRA Keogh/SEP information
- ❑ Social security benefits received for the family
- ❑ Welfare benefits
- ❑ Workers compensation
- ❑ Veterans benefits
- ❑ Income earned abroad

Parent Asset Information

- ❑ Home purchase and mortgage information
- ❑ Home insurance information
- ❑ Face value of parents' life insurance policies

Divorced/Separated or Never Married Parent Information

- ❑ Alimony/child support
- ❑ Amounts of household expenses/money paid by divorced or separated parents in lieu of child support

Debt/Expense Information

- ❑ Mortgage debt
- ❑ Consumer debt
- ❑ Medical debt and expenses
- ❑ Childcare expenses for employment reasons
- ❑ Rent, if home is not owned
- ❑ Annual cost of clubs if over $250
- ❑ Annual cost of vacations
- ❑ Total car debt if owned and/or annual lease cost
- ❑ Total RV/boat debt

NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

SCHOOL & STUDENT SERVICES BY NAIS
PO Box 449, Randolph, MA 02368-0449
sss@nais.org

PFS Cover Sheet
2010–2011 Academic Year
Helpline: 800-344-8328

PFS Documentation Cover Sheet

Always include this cover sheet when sending any documents.

Complete this cover sheet and send with *all* documentation supporting your Parents' Financial Statement (PFS). Fill in your *PFS ID Number* and all fields in the *Household Information* and *Documentation* sections. Please print legibly.

YOUR PFS ID NUMBER: ________________________

Household Information

Parent/Guardian A

Last name ____________ First name ____________

Address ____________ Suite/Apt. No. ____________

City ____________ State/Province ____ Zip/Postal Code ____________

Country ____________ Date of Birth *mmddyy* ____________

Email ____________

Parent/Guardian B

Last name ____________ First name ____________

Address ____________ Suite/Apt. No. ____________

City ____________ State/Province ____ Zip/Postal Code ____________

Country ____________ Date of Birth *mmddyy* ____________

Email ____________

Documentation

Select all documents you will be mailing along with this cover sheet.

- ❑ Parents' Financial Statement (PFS)
- ❑ 1040, 1040A, 1040EZ
- ❑ W2 Form
- ❑ 1099 Form
- ❑ Business/Farm Statement
- ❑ Other Tax Form ______________________
- ❑ Additional School Request (ASR)
- ❑ PFS Change Request Form
- ❑ Other Form ______________________

Mailing Instructions

Gather all tax and required documentation and bundle with this cover sheet. **Do *not* staple or put checks or forms on top of this cover sheet.**

Mail cover sheet and documentation to:

School and Student Services By NAIS
PO Box 449
Randolph, MA 02368-0449 USA

For Office Use Only

NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

SCHOOL & STUDENT SERVICES BY NAIS

SSS By NAIS BUSINESS / FARM STATEMENT

2010–2011 Academic Year

To be completed by owners of businesses/farms and returned directly to SSS By NAIS.

INSTRUCTIONS

- Complete this statement before completing the Parents' Financial Statement (PFS). Complete a separate Business/Farm Statement for each business/farm that you own. Send the completed forms to SSS By NAIS, along with the documents required by the school(s) to which you are applying.
- When completing this statement, refer to the following IRS forms: Schedule C (1040) for sole proprietors, Schedule F (Profit or Loss from Farming), Form 1065 for partnerships, and Form 1120 for corporations. Estimate as accurately as possible if your tax forms have not been completed.
- Schools may request you to submit profi t and loss statements, balance sheets, or tax returns in addition to the Business / Farm Statement.
- If your personal residence is part of the business/farm, do not enter the home market value and home mortgage on this statement. Your home market value and mortgage must be entered at items 10A through 10T.
- If a question is not applicable, enter zero (0).

PART I

1A Student applicant information:

Name ______ Date of Birth ______

Address ______

City ______ State ______ Zip Code ______

1B Parent / Guardian information:

Owner of Business/farm ______

Address (if different from student's) ______

City ______ State ______ Zip Code ______

PART II

2A Business / farm name and address:

Name ______

Address ______

City ______ State ______ Zip Code ______

2B Year business / farm operation began: . . . . ______

2C Business / farm product or service: ______

2D Check one:
☐ Sole Proprietor ☐ Partnership ☐ Corporation

2E If not sole proprietor, indicate percent of ownership: ______ %

BUSINESS / FARM INCOME AND EXPENSES

Enter information in boxes. Enter a zero (0) if no other entry applies.

	2009	Estimated 2010
3. Business / Farm Income:		
A. Gross receipts and sales (Do not include returns and allowances.)	$	$
B. Cost of goods sold and/or operations (Do not include any amount that is listed under business/farm expenses.)	$	$
C. Gross profit (item 3A minus item 3B)	$	$
D. Other business/farm income	$	$
E. Total business/farm income (item 3C plus item 3D)	$	$
4. Business/Farm Expenses:		
A. Wages		
1. You and your spouse	$	$
2. Other wages	$	$
3. Additional compensation	$	$
B. Business Property		
1. Rent	$	$
2. Mortgage	$	$
3. Depreciation	$	$
C. Other business / farm expenses (Please explain.)	$	$
D. Total business / farm expenses (add items 4A through 4C)	$	$
5. Total Net Profit / Loss: Total business/farm income (item 3E) minus total business/farm expenses (item 4D)	$	$
6. Your Share of Profit / Loss: Refer to Schedule C (1040), Schedule F, Form 1065, or Form 1120 Enter at PFS item 7I.	$	$

BUSINESS / FARM ASSETS AND DEBTS

Enter information in boxes. Enter a zero (0) if no other entry applies.

	2009	Estimated 2010
7. Assets:		
A. Current business/farm assets (include total cash of business/farm accounts and other current business/farm assets) minus amount reserved for bad debts	$	$
B. Land and buildings (Give present market value; do not include personal residence.).	$	$
C. Cash reserves for depreciation	$	$
D. Equipment, machinery, other business/farm assets	$	$
E. Livestock (fair market value)	$	$
F. Grain, hay, and other products	$	$
G. Accounts receivable (business/farm accounts)	$	$
H. Other business/farm assets	$	$
I. Total assets (add items 7A through 7H). Enter at PFS item 7M	$	$
8. Debts:		
A. Mortgage on land and buildings (Do not include personal residence.)	$	$
B. Debts on equipment and machinery	$	$
C. Other business/farm debts	$	$
D. Total debts (add items 8A through 8C). Enter at PFS item 7N	$	$

CERTIFICATION AND AUTHORIZATION

We declare that the information reported on this form, to the best of our knowledge and belief, is true, correct, and complete. We recognize that intentionally providing false or inaccurate data may impact our ability to receive any financial aid and/or our ability to maintain a contract with a school. We authorize transmittal of this form and the information within it to the schools and organizations to which we have applied and its use by School and Student Services By NAIS and its third-party service providers. The SSS, it's third-party service providers, and any of the schools and organizations designated by us to receive copies of this information have our permission to verify the information reported, and we understand and agree that this verification may include the disclosure of personal and financial information, such as an official copy of our latest income tax return and/or a signed IRS Form 4506. If you do not agree to the above, please do not submit your SSS Business/Farm Statement.

Send completed Business/Farm Statement to:
School and Student Services By NAIS, Application Processing Center,
P.O. Box 449, Randolph, MA 02368-0449 USA.

Signature of Parent / Guardian

Date

Signature of Parent / Guardian

Date

Explanations:

NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

Form **4506-T**

(Rev. January 2008)

Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

▶ **Do not sign this form unless all applicable lines have been completed. Read the instructions on page 2.**

▶ **Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.**

OMB No. 1545-1872

Tip: Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. 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 or employer identification number (see instructions)**
2a If a joint return, enter spouse's name shown on tax return	**2b Second social security number if joint tax return**

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code

4 Previous address shown on the last return filed if different from line 3

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. The IRS has no control over what the third party does with the tax information.

Director of Financial Aid, Rowland Hall, 843 Lincoln Street, Salt Lake City, UT 84102

Caution: ***DO NOT SIGN*** *this form if a third party requires you to complete Form 4506-T, and lines 6 and 9 are blank.*

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. 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 is a combination of line item information and later adjustments to the account. 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. 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 2006, filed in 2007, will not be available from the IRS until 2008. 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.

12 / **31** / **09**   ___/___/___   ___/___/___   ___/___/___

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.

Telephone number of taxpayer on line 1a or 2a
(   )

Sign Here

Signature (see instructions)   ~~Date~~ XXX

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature   ~~Date~~ XXX

General Instructions

Purpose of form. Use Form 4506-T to request tax return information. You can also designate a third party to receive the information. See line 5.

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 RAIVS teams, send your request to the team based on the address of your most recent return.

Note. *You can also call 1-800-829-1040 to request a transcript or get more information.*

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

If you filed an individual return and lived in:	Mail or fax to the "Internal Revenue Service" at:
District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New York, Vermont	RAIVS Team Stop 679 Andover, MA 05501 978-247-9255
Alabama, Delaware, Florida, Georgia, North Carolina, Rhode Island, South Carolina, Virginia	RAIVS Team P.O. Box 47-421 Stop 91 Doraville, GA 30362 770-455-2335
Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301 512-460-2272
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Iowa, Kansas, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888 559-456-5876
Arkansas, Connecticut, Illinois, Indiana, Michigan, Missouri, New Jersey, Ohio, Pennsylvania, West Virginia	RAIVS Team Stop 6705–B41 Kansas City, MO 64999 816-292-6102

Chart for all other transcripts

If you lived in or your business was in:	Mail or fax to the "Internal Revenue Service" at:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Georgia, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Tennessee, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409 801-620-6922
Connecticut, Delaware, District of Columbia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia, Wisconsin	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) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

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 60 days of the date signed by the taxpayer or it will be rejected.

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 Internal Revenue Code 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. Sections 6103 and 6109 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, and the District of Columbia 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 the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 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.