

# INSTRUCTIONS

## PART I

Your designation identifies to the PA Department of Revenue the person, firm or agency to whom the PA Department of Revenue should send the tax records that you authorized us to release.

**Lines 1-4** - If you authorize the release of your tax return to an agency or firm (such as a government agency, scholarship board or mortgage lender) on line 2, you must include the name of an individual whom we may contact and a daytime telephone number. Complete all address information requested on lines 3 and 4.

## PART II

**Item 1.** - If you authorize the release of a joint Personal Income Tax return, indicate the name of both spouses as shown on the original return.

**Item 2.** - For Personal Income Tax returns, enter your social security number. For joint tax returns, also enter your spouse's social security number. Please include this information to expedite processing your request.

If corporate tax reports are requested, enter the corporation tax file (box) number.

If sales tax returns are requested, enter the sales tax license number.

**Item 3.** - Enter the particular tax (use these abbreviations); i.e., Personal Income Tax (PIT), Corporation Tax (CT), Sales and Use Tax (S&U), Employer Withholding (EMP), etc.

**Item 4.** - Enter the particular record requested; i.e., tax return, report or schedule.

**Item 5.** - Enter the year(s) of the tax returns that you are requesting. For fiscal year filers, enter the period ending date. If you request more than five different periods, use additional forms. Returns which are filed five or more years ago may not be available for release.

**Item 6.** - Enter your current street address.

**Item 7.** - If same as in item 6, enter "Same."

## PART III

The PA Department of Revenue will accept only an original dated release signed by the taxpayer identifying the specific tax records and tax years.

If you are not the taxpayer described in Part II, you must send a copy of your authorization to request the release of the tax records. This usually will be a power of attorney on tax matters or, if the taxpayer is deceased, sufficient evidence to establish that you are authorized to act for the taxpayer's estate.

Copies of joint returns may be furnished at the request of either the husband or the wife. Only one signature is required.

Corporate tax records will be available for release only by a duly authorized officer.

Partnership tax records will be available for release only by a general partner.

**WHERE TO FILE** — Send the completed form to:

PA Department of Revenue  
Office of Chief Counsel  
Dept. 281061  
Harrisburg, PA 17128-1061

Please allow four to six weeks for your request to be processed.



PA Department of Revenue  
Office of Chief Counsel  
Dept. 281061  
Harrisburg, PA 17128-1061

**AUTHORIZATION  
FOR RELEASE OF TAX RECORDS**

PLEASE PRINT OR TYPE

Pennsylvania tax records are confidential information which may be released only to the taxpayer or pursuant to a release signed by the taxpayer. Unauthorized disclosure of tax information is a criminal offense.

Completion of this form will authorize the PA Department of Revenue to release the tax return documents requested in Part II.

Carefully read the instructions on the reverse side to assure that your request can be processed promptly. It is important that all questions be answered completely.

**PART I - DESIGNATION OF INDIVIDUAL TO RECEIVE TAX RECORDS**

1. \_\_\_\_\_ ( )  
Full Name of Designated Individual Telephone No.

2. \_\_\_\_\_  
Name of Individual, Firm, or Agency

3. \_\_\_\_\_  
Street Address

4. \_\_\_\_\_  
City State Zip Code

**PART II - TAX RECORDS TO BE RELEASED (See instructions on reverse side.)**

1 Taxpayer's Name As Shown On Original Return	2 Tax ID No.	3 Tax	4 Record	5 Tax Period

6. \_\_\_\_\_  
Current Street Address of Taxpayer  
City State Zip Code

7. \_\_\_\_\_  
Street Address Used In Filing Returns  
City State Zip Code

**PART III - CERTIFICATION**

I certify that I:

- am the individual whose tax records are to be released.
- am a duly authorized corporate officer of the corporation whose tax records are to be released.  
\_\_\_\_\_ (Corporate Title)
- am a general partner of the partnership whose tax records are to be released.
- am empowered by a power of attorney on tax matters to request release of the tax records. See instructions on reverse side.
- have been appointed as the executor or administrator of the deceased taxpayer whose tax records are to be released. See instructions on reverse side.

Signature \_\_\_\_\_

Date \_\_\_\_\_