TO: All USERS

FROM: Compliance and QC Officer   
DATE: 2/13/2025

SUBJECT: Completion of 4506C Form

**A 4506C Template has been made to assist in the Accurate Completion of the 4506C Form**.

Go to Request for Transcript of Tax Form:

A screenshot of a computer

Description automatically generated

Click on Add from Template -Top Right

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Description automatically generated

Pop-Up Appears – Click on Template and click Select

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A screenshot of a computer screen

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The form will populate accurate information on 5a and 5d and the correct years in Section 8

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**VERY IMPORTANT. DO NOT INCLUDE SPOUSE INFORMATION on THE FORM. EACH BORROWER**

**MUST HAVE THEIR OWN 4506C Form.**

Go to the Top of the form – Tax form is for and pick the appropriate drop down -Borrower or Co-Borrower



Then Click Copy from Borrower Summary A screenshot of a computer

Description automatically generated

**If the Borrower has moved since the last tax filing, you must also complete #4**

**Be sure to Check the appropriate box in Section 6 or 7**

**Be sure to verify with all borrowers the name they filed their taxes in. If they used a maiden**

**Name or Previous name then you must complete # 1C**

Click add to Efolder at Top

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Description automatically generated

**Complete the above steps for all borrowers**