



# Authorization for Release of Photocopies of Tax Returns and/or Tax Information

This form must be signed by the taxpayer or the taxpayer's authorized representative, and a form of identification to validate your signature must be provided (such as a photocopy of your driver license or non-driver ID card).

## Part A – Taxpayer information

Taxpayer's name	Taxpayer's SSN or EIN
Joint taxpayer's name	Joint taxpayer's SSN
Street address	Telephone number (include area code)
City, state, ZIP code	

## Part B – Tax return information (attach additional sheets if necessary)

If you are authorizing the release of **only** information verifying the timely filing of tax returns listed below, mark an **X** in the box (see instr.) ..

Column A	Column B	Column C
Tax type (Mark an X in the appropriate boxes for the type of tax information requested.)	Tax years requested (List all years or periods requested for the tax types in Column A.)	Information requested
Income tax <input type="checkbox"/>		
Sales tax <input type="checkbox"/> VIN number (only if requesting Form DTF-802)		
Wage reporting/W-2 info <input type="checkbox"/>		
Corporation tax <input type="checkbox"/>		
Withholding tax <input type="checkbox"/>		
Other (list) <input type="checkbox"/>		
If the copies must be certified mark an X here. <input type="checkbox"/>	<b>Reason for request</b>	

## Part C – Third party or authorized individual information (Complete this section only if the return or information is to be sent to someone other than the taxpayer.)

Print name of third party or authorized individual	
Print firm's name (if applicable)	
Street address (number and street or PO Box)	
City, state, ZIP code	Telephone number (include area code)

## Part D – Certification

I certify that I am either the taxpayer whose name is shown on the return, or the taxpayer's representative authorized to obtain the tax return or information requested.	
Printed name of taxpayer or authorized representative	Title
Signature of taxpayer or authorized representative	Date

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# Instructions

## General instructions

Use this form to request copies of paper returns or e-filed returns not available through Online Services.

You may be able to access certain tax information online. Visit our website (see *Need help?*) to create an Online Services account to view and print a copy of your e-filed return for the following tax types:

- Sales and use
- Corporation
- Fuel use

Refer to the website for the most current information.

## Payment and mailing information

There is a charge of twenty-five cents (\$.25) per page. **Send no payment now.** The amount due will be billed to you in the letter we send upon completion of your request.

Mail your completed request, along with a copy of a **form of identification from which your signature can be validated**, to:

**NYS TAX DEPARTMENT  
DISCLOSURE UNIT  
W A HARRIMAN CAMPUS  
ALBANY NY 12227-0870**

If not using U.S. Mail, see Publication 55, *Designated Private Delivery Services*.

### Important information

**We will return your request if the form is incomplete or you did not provide a legible copy of your valid identification.** It takes approximately 30 days for your request to be processed once all the necessary information has been received. To avoid delays, be sure to:

- specify as best you can the type of information being requested,
- provide the reason for your request,
- include a daytime phone number,
- sign Part D of this form, and
- **provide a form of identification from which your signature can be validated.**

## Specific instructions

### Part A – Taxpayer information

Complete this section for all requests.

### Part B – Tax return information

If you want us to provide **only** information regarding whether the returns and years requested were timely filed, mark an **X** in the box in Part B. If you mark this box, we will not provide copies or any other return-specific information.

Mark an **X** in the appropriate boxes in *Column A* and list the years or periods requested in *Column B*. List the specific information you would like to receive in *Column C*. If you need certified copies, mark an **X** in the box in *Column A*.

If you are requesting proof of sales tax paid on a purchase of a motor vehicle, or a copy of your Form DTF-802, *Statement of Transaction – Sale or Gift of Motor Vehicle, Trailer, All Terrain Vehicle (ATV), Vessel (Boat), or Snowmobile*, provide the vehicle identification number (VIN) in the space provided.

## Part C – Third party or authorized individual information

Complete this section only if you are requesting that the information be sent to someone other than you.

## Part D – Certification

This form must be signed by the taxpayer or the taxpayer's authorized representative, and you must provide a form of identification from which your signature can be validated (such as a legible photocopy of your valid driver license or non-driver ID card). If the request applies to a joint return, only one spouse is required to sign.

If the taxpayer is unable to sign, you must submit a power of attorney, power of appointment, or other evidence to establish that you are authorized to act on behalf of the taxpayer or are authorized to receive the taxpayer's tax information. A representative can sign Form DTF-505 for a taxpayer only if this authority has been specifically delegated to the representative on a power of attorney (for example, Form POA-1, *Power of Attorney*). **Attach a copy.**

For a corporation, the signature of the president, secretary, or other principal officer is required.

For partnerships, any person who was a member of the requesting partnership during any part of the tax period can sign the form.

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 notification

New York State Law requires all government agencies that maintain a system of records to provide notification of the legal authority for any request for personal information, the principal purpose(s) for which the information is to be collected, and where it will be maintained. To view this information, visit our website, or, if you do not have Internet access, call and request Publication 54, *Privacy Notification*. See *Need help?* for the Web address and telephone number.

## Need help?



Visit our website at **[www.tax.ny.gov](http://www.tax.ny.gov)**

- get information and manage your taxes online
- check for new online services and features

### Telephone assistance

Personal Income Tax Information Center:	518-457-5181
Corporation Tax Information Center:	518-485-6027
Sales Tax Information Center:	518-485-2889
Withholding Tax Information Center:	518-485-6654
Miscellaneous Tax Information Center:	518-457-5735

To order forms and publications: 518-457-5431

Text Telephone (TTY) or TDD  
equipment users

Dial 7-1-1 for the  
New York Relay Service

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