



STATE OF CALIFORNIA
 DATA STORAGE
FRANCHISE TAX BOARD
 PO BOX 1570
 RANCHO CORDOVA CA 95741-1570

REQUEST FOR COPY OF PERSONAL INCOME TAX OR FIDUCIARY RETURN

Please see other side of this form to request Corporation (100, 100S, 100W, 100WE, or 199), Partnership (565), or Limited Liability Company (568) Returns.

Requester's Name	Taxpayer's Name (as shown on return)	
Requester's Address	Taxpayer's Address (as shown on return)	
Requester's Telephone Number	Taxpayer's Telephone Number	
Tax Years Requested	Social Security Number or FEIN	
	Spouse/Registered Domestic Partner (RDP) Social Security Number (if joint return filed)	
Signature of Taxpayer or Authorized Representative	Type or Print Name	Date
Signature of Spouse/RDP (if joint return filed)	Type or Print Name	Date

If a paid preparer completed your tax returns, check first to see if you can get a copy from the preparer to save you both time and money. **Attach a copy of the taxpayer's signed photo ID with this request for signature identification purposes. (e.g., a California driver's license or a California identification card)**

Copies of your personal income tax returns are **only** available for the last three and a half years from the date the returns were filed. There is a \$20.00 charge for each tax year requested.

You **must** sign this request. Without proper authorization, we cannot provide you with the requested copies. If you are **not** the taxpayer, you must provide appropriate authorization to receive copies of tax returns or claims. Appropriate authorization includes one of the following:

- A letter signed by the taxpayer authorizing the Franchise Tax Board to release the requested material to you and a photocopy of the taxpayer's ID.
- A current Power of Attorney (FTB 3520).
- An Internal Revenue Service Power of Attorney stating that it applies to FTB.
- A copy of Form FTB 3516 signed by the taxpayer and a photocopy of the taxpayer's ID.
- A certified copy of the letters of administration or testamentary dated within the past 12 months, if the taxpayer is deceased. If the letters are more than 12 months old, a clerk of the court must recertify them stating they are still in effect.

If a bankruptcy is involved and you are **not** the taxpayer, you must also provide one of the following:

- A court document appointing you as trustee.
- A letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee.

Send a check or money order payable to the Franchise Tax Board for \$20.00 to the address above for each tax year you request. If the tax return was for a tax year in which you were a victim of a designated California state or federal disaster, there is no charge for a copy of your personal income tax return. For additional information, call (916) 845-5375 (not toll free).



**REQUEST FOR COPY OF CORPORATION, EXEMPT ORGANIZATION,
 PARTNERSHIP, OR LIMITED LIABILITY COMPANY RETURN**

Please see other side of this form to request Personal Income Tax (540, 540A, 540EZ, 540NR, or Fiduciary [541]) Returns.

Requester's Name		Business/Corporation's Name (as shown on return)	
Requester's Address		Business/Corporation's Address (as shown on return)	
Tax Return Requested (check box below)	Taxable Years or Fiscal Year End Date	Corporation Number	Federal Employer Identification Number
<input type="checkbox"/> 100 – Corporation Return			
<input type="checkbox"/> 100W – California Franchise or Income Tax Water's-Edge Corporation Return			
<input type="checkbox"/> 100WE – Water's Edge Corporation Return			
<input type="checkbox"/> 100S – S Corporation Return			
<input type="checkbox"/> 109 – Exempt Organization Business Income Tax Return			
<input type="checkbox"/> 199 – Exempt Organization Annual Information Return			
<input type="checkbox"/> 565 – Partnership Return			
<input type="checkbox"/> 568 – Limited Liability Company Return		California Secretary of State Number	
Signature and Title of Officer or Trustee (Authorized Representative or signature of the person who signed the tax return)		Type or Print Name	
		Daytime Telephone Number	Date

If a paid preparer completed your tax returns, check first to see if you can get a copy from the preparer to save you both time and money.

Copies of corporation, exempt organization, and limited liability company tax returns are **only** available for the last five years. Partnership returns are retained for three and a half years from the original date the return was filed. There is a \$20.00 charge for each tax year requested.

A current authorized representative of the taxpayer must sign this request and provide the business title. Without proper authorization, we cannot provide the requested copies. Proper authorization includes:

- Any person designated by action of its board of directors, or other similar governing body, upon submission of satisfactory evidence of such action.
- Any officer or employee of the corporation with written request signed by any principal officer under the corporate seal, if any.
- A power of attorney.
- A letter of testamentary that appoints you as executor.
- A letter of administration that appoints you as administrator.
- A letter of conservatorship that appoints you as conservator.
- A court document that appoints you as trustee.

If a suspended corporation is involved, any amounts owed must be paid before we can send you the requested information. To determine the amount owed, please call one of the following numbers: from within the United States, (800) 852-5711; from outside the United States (not toll-free), (916) 845-6500; or for the hearing or speech impaired (800) 822-6268.

If a bankruptcy is involved and you are **not** the taxpayer, you must also provide one of the following:

- A court document appointing you as trustee.
- A letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee.

Send a check or money order payable to the Franchise Tax Board for \$20.00 to the address above for each tax year you request. If the tax return was for a tax year in which you were a victim of a designated California state or federal disaster, then there is no charge for a copy of your tax return. For additional information, call (916) 845-5116 (not toll free).