

Please Note

- Have you filed all required Federal income tax returns?
- If not, have you filed for an approved IRS extension?

If the answer to both questions above is no, **SBA WILL NOT process your application for disaster assistance until this requirement has been met.**

INSTRUCTIONS FOR COMPLETING FORM 8821

Completing this document is as easy as A-B-C

A.

Write your name(s) and address in block # 1.

B.

Next, write your Social Security Number(s). If you are a corporation or a partnership, write the Employer Identification Number.

C.

Print your name(s) and provide your signature(s) and date in block 7. For a corporation the IRS Form 8821 must be signed by the President or Chief Executive Officer of the corporation. If the 8821 is signed by any other officer, the signature must be attested to by another corporate officer with their signature, date, and title also appearing on the 8821.

Form **8821** Tax Information Authorization (Rev. September 1998)

Department of the Treasury Internal Revenue Service

► IF THIS AUTHORIZATION IS NOT SIGNED AND DATED, IT WILL BE RETURNED.

OMB No. 1545-0047 For IRS Use Only

Received by: Name: Telephone: Fax: Date: / /

1 Taxpayer information. Taxpayer name(s) and address (please type or print) John C. Doe and Mary A. Doe, One Any Avenue, Anytown, ST 00000. Social security number(s) 000 : 00 : 0000, 999 : 99 : 9999. Employer identification number. Daytime telephone number. Fax number (if applicable).

2 Appointee. Appointee name (please type or print) Small Business Administration, Office of Disaster Assistance. CAF No., Telephone No. (404) 347-3771, Fax No. (404) 347-4199. Check if new: Address, Telephone No.

3 Tax matters. The appointee is authorized to inspect and/or receive confidential tax information in any office of the IRS for the tax matters listed on this line.

(a) Type of Tax (Income, Employment, Excise, etc.)	(b) Tax Form Number (1040, 941, 720, etc.)	(c) Year(s) or Period(s)	(d) Specific Tax Matters (see instr.)
Tax Return Transcript	Series 1040, 1065, 1120, 990	2005, 2006 and 2007	
Installment Agreement		For tax years beginning	
and/or Lien Information		1997 through 2007	

4 Specific use not recorded on Centralized Authorization File (CAF). If the tax information authorization is for a specific use not recorded on CAF, check this box. (See the instructions on page 2.)

5 Disclosure of tax information (you must check box 5a or b unless box 4 is checked):
 a if you want copies of tax information, notices, and other written communications sent to the appointee on an ongoing basis, check this box.
 b if you do not want any copies of notices or communications sent to your appointee, check this box.

6 Retention/revocation of tax information authorizations. This tax information authorization automatically revokes all prior authorizations for the same tax matters you listed above on line 3 unless you checked the box on line 4. If you do not want to revoke a prior tax information authorization, you MUST attach a copy of any authorizations you want to remain in effect AND check this box. To revoke this tax information authorization, see the instructions on page 2.

7 Signature of taxpayer(s). If a tax matter applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute this form with respect to the tax matters/periods covered.

John C. Doe, 3/15/08, Mary A. Doe, 3/15/08
 Signatures, Date, Print Name, Title (if applicable)

General Instructions
 Section references are to the Internal Revenue Code unless otherwise noted.
Change To Note. New column (d) is added to line 3 for specific tax matters. Use column (d) to specify tax information that is to be provided by the IRS. See the line 3 instructions on page 2.
 you, use Form 2848, Power of Attorney and Declaration of Representative, instead of Form 8821. You may file your own tax information authorization without using Form 8821, but it must include all the information that is requested on the form.
 Taxpayer identification numbers (TINs). TINs are used to identify taxpayer information with corresponding tax returns. It is important that you furnish correct names, social security numbers (SSNs),

Note: The IRS Form 8821 may be photocopied if more than one form is needed for your loan application.

While the IRS Form 8821 will allow SBA to obtain your tax return information from the IRS, you may also submit copies of your Federal Tax Returns. Please note if you are a corporation, partnership, limited liability entity, or private non-profit, you **must** also submit complete copies of your three most recent Federal Tax Returns (including all schedules) in addition to the IRS Form 8821.

A separate IRS Form 8821 must be returned with the disaster loan application for: (1) each disaster applicant (individuals filing joint returns may use a single IRS Form 8821), (2) each corporation or partnership in which the disaster loan applicant holds a 50% or greater interest, (3) each individual or entity which holds a 20% or greater interest in the disaster loan applicant, (4) each general partner, and (5) each affiliate business.

Every applicant MUST complete, sign, date, and return the IRS Form 8821(s) with the disaster loan application package.