



### IRS 8821 Information Request Form

Please fill out the following information so we can complete an IRS Tax Authorization (form 8821). We use this information to create your 8821 form and will send to you for review and signature. Processing generally takes between 5–10 business days.

Full Legal Name (including middle Initial) \_\_\_\_\_

Full Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

SS # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Tax Form Filed (normally 1040) \_\_\_\_\_ Tax Year Range \_\_\_\_\_

Best Phone Number \_\_\_\_\_ Email \_\_\_\_\_

If Joint request (MFJ) Please fill out this section.

Full Legal Name (including middle Initial) \_\_\_\_\_

Full Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

SS # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Best Phone Number \_\_\_\_\_ Email \_\_\_\_\_

Official Use:

8821 \_\_\_\_\_ Date Received \_\_\_\_\_ Date Sent to CAF \_\_\_\_\_ Date Processed \_\_\_\_\_

Referring Partner \_\_\_\_\_ Payment Amount \_\_\_\_\_ Payment Date \_\_\_\_\_

Payment Type: DD BOA \_\_\_\_\_ PayPal \_\_\_\_\_ Zelle \_\_\_\_\_ Other \_\_\_\_\_

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