Print, sign, and submit the original signed form.

NEW YORK STATE

Department of Taxation and Finance

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

DTF-505 (4/17)

Part A – Taxpayer information

Taxpayer's name as shown on return	Taxpayer's SSN or EIN as shown on return
Joint taxpayer's name as shown on return	Joint taxpayer's SSN as shown on return
Street address as shown on return	Telephone number ( )
City, state, ZIP code as shown on return	VIN number *(only if requesting Form DTF-802)*
Current name or names *(if different from name(s) above)*	
Current address *(if different from address above)*	

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

Column A	Column B
Tax type *(Mark an **X** in one box in each row for the type of tax information requested.)*	**Tax year(s) requested** *(List all years or periods requested for the tax type in Column A.)*
Income tax ☐ Corporation tax ☐ Withholding Tax ☐ Sales tax ☐ Other *(tax type)*: ________ ☐	
Income tax ☐ Corporation tax ☐ Withholding Tax ☐ Sales tax ☐ Other *(tax type)*: ________ ☐	
Income tax ☐ Corporation tax ☐ Withholding Tax ☐ Sales tax ☐ Other *(tax type)*: ________ ☐	
If you are authorizing the release of **only** information verifying the timely filing of tax returns listed above, mark an ***X*** here. .... ☐	If the copies must be certified for court or administrative proceedings, mark an ***X*** here. .... ☐
Reason for the request	

Part C – Third party information *(Complete this section only if the return or information is to be sent to a third party, such as a mortgage company.)*

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

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. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form DTF-505 on behalf of the taxpayer.

Printed name of taxpayer or authorized individual	Title
Signature of taxpayer or authorized individual	Date

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

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Instructions

General instructions

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.

Use this form to request copies of e-filed returns not available through *Online Services*, or paper returns. We will send a photocopy of the return, if available; otherwise, we will send a return transcript.

Note: Our personal income tax return transcripts show only the information entered on the return as originally filed. We do not offer tax account transcripts like those provided by the Internal Revenue Service.

Enclose a check or money order payable in U.S. funds to the ***Commissioner of Taxation and Finance***. The minimum fee is $2.00. This fee covers the cost of processing the request at the rate of twenty-five cents ($.25) per page. We do not accept blank checks, credit cards, or debit cards. If you are unsure of the number of pages, send us a check for $2.00 and we will bill you the amount due.

Mail your completed request 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*.

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,
- enclose a check for the processing fee,
- sign *Part D* of this form, and
- **provide a form of identification from which your signature can be validated.**

Part A – Taxpayer information

Complete this section for all requests. 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 B – Tax return information

Complete one row for each type of tax information you are requesting.

Column A – Mark an ***X*** in one box in each row, as applicable.

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

Column B – List the years or periods for the tax information requested in the corresponding row in Column A. Mark an ***X*** in the appropriate box if you need certified copies for court or administrative proceedings.

Provide the reason for your request and any additional information that will help us process your request. If you need more space, enter ***see attached*** in this section and attach the relevant information.

Part C – Third party 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 (usually 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***
- get information and manage your taxes online
- for new online services and features

Telephone assistance

Business Tax Information Center:	(518) 457-5342
Personal Income Tax Information Center:	(518) 457-5181
To order forms and publications:	(518) 457-5431
Text Telephone (TTY) Hotline (for persons with hearing and speech disabilities using a TTY):	(518) 485-5082

Persons with disabilities: In compliance with the Americans with Disabilities Act, we will ensure that our lobbies, offices, meeting rooms, and other facilities are accessible to persons with disabilities. If you have questions about special accommodations for persons with disabilities, call the information center.