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| Form **8796-A**<br>(September 2021) | Department of the Treasury - Internal Revenue Service<br># Request for Return/Information<br>*(Federal/State Tax Exchange Program - State and Local Government Use Only)* |

**Section A**

Return to

I am requesting the following identified return(s)/return information under terms of the Federal/State Tax Coordination Agreement. I understand disclosure or use of the information received for other than authorized tax administrative purposes is subject to criminal and civil liabilities under sections 7213 and 7431 of the Internal Revenue Code.

**Section B**

| 1. Name of taxpayer | SSN/EIN |
|---|---|

Address

| 2. Information requested | Tax periods | Type of return forms |
|---|---|---|
| Copy of return(s) ☐ Yes ☐ No | | |

Check the appropriate block

☐ Transcript ☐ Audit workpapers

☐ Outstanding balance of assessments including penalties and interest computed to _____

☐ Other *(specify below)*          *(date)*

3. Reason requested *(check the appropriate block)*

☐ Pending examination      ☐ Criminal investigation

☐ Pending collection activity      ☐ Other *(specify)* _____

**Section C**

| 1. Name of employee making request | Date request made | |
|---|---|---|
| 2. Group manager signature | Group manager phone number | Division/Branch/Group |
| 3. From *(signature/authorized representative)* | Date signed | Telephone number |

4. Requesting agency

Agency name _____

Attention _____

Street address _____

Street address _____

City, state, ZIP code _____

## Instructions for Form 8796-A, Request for Returns/Information under Federal/State Exchange Agreement

The form may be used by state and local tax agency personnel requesting return(s) or return information from IRS.

Complete Sections A, B and C. After signature approval, forward to the pre-printed address in Section A. State the agency's need and use for the requested data as specifically as possible in section B-3. A general statement that it is needed for tax administration is insufficient.

**Note**: Do not send expedite requests or other requests that require local handling to the address in Section A. Contact your local Disclosure Office. If the office agrees to expedite or otherwise handle your request locally, you will submit it directly to that office.