

Mortgage Lender Tax Information Disclosure Consent Form

This form authorizes the lender listed below to request, receive, and review your tax return information from the Internal Revenue Service (IRS) for the purpose of verifying your financial information in connection with your mortgage application.

1. Borrower Information

First Name: Last Name:
Social Security Number (SSN): Date of Birth:
Current Address:
City: State / ZIP:

2. Co-Borrower Information (If Applicable)

First Name: Last Name:
Social Security Number (SSN): Date of Birth:

3. Mortgage Lender Information

Lender / Institution Name:
Contact Person:
Mailing Address:

4. Tax Transcript Information Requested

Specify the tax form and the calendar years for which disclosure is authorized:

Tax Form Number (e.g., 1040, W-2, 1099):
Requested Tax Years (e.g., 2021, 2022, 2023):

5. Consent and Authorization

By signing below, I/we authorize the Internal Revenue Service to disclose and release my/our federal tax return transcripts and related tax information to the Mortgage Lender named above. I/we understand that this information will be used solely for the purpose of evaluating and processing my/our mortgage loan application. This consent remains valid for the duration of the underwriting process or as permitted by applicable law.

I/we declare under penalty of perjury that I am/we are the taxpayers whose signatures appear below and that I/we have the authority to sign this disclosure consent.

Borrower Signature: Date:
Co-Borrower Signature: Date:

Instructions for Print: Please verify all entered text is correct, print this document, sign and date within the signature blocks above, and return the completed physical form to your Mortgage Lender.