



REV-467

AUTHORIZATION FOR RELEASE OF TAX RECORDS

SECTION I DESIGNATION OF INDIVIDUAL TO RECEIVE TAX RECORDS

Full Legal Name of Designated Individual Telephone Number

Agency or Firm Email Address

Address City State ZIP Code Country Code

SECTION II TAX RECORDS TO BE RELEASED

Taxpayer's Name or Business Name as shown on Original Return SSN/FEIN/Tax ID

Trade Name or DBA (if different from Legal Name)

Current Address City State ZIP Code Country Code

Address Used in Filing Returns City State ZIP Code Country Code

TAX TYPE TO BE RELEASED	RECORD TYPE TO BE RELEASED	TAX PERIOD BEGIN AND END DATES

SECTION III CERTIFICATION

I certify that:

- I am the individual whose tax records are to be released.
- I am a duly authorized corporate officer of the corporation for which tax records are to be released.
- I am a general partner of the partnership for which tax records are to be released.
- I am the authorized responsible party for which tax records are to be released.
- I am empowered by a power of attorney on tax matters to request release of the tax records.
- I have been appointed as the executor or administrator of the will or estate of the deceased taxpayer whose tax records are to be released.
- I have included my state issued driver's license, state issued photo ID, and/or valid passport with proof of address.

Name Signature Title Date





Instructions for REV-467

Authorization for Release of Tax Records

GENERAL INFORMATION

Pennsylvania tax records are confidential and may be released only to the taxpayer or pursuant to a release signed by the taxpayer. Unauthorized disclosure of tax information is a criminal offense. Completion of this form authorizes the Pennsylvania Department of Revenue to release the tax return documents identified in Section II. Carefully read the instructions and fill out the form completely.

 **IMPORTANT:** A valid state issued driver's license or valid state issued photo ID, and acceptable authorization documentation must be submitted with the request. Please refer to the acceptable forms of ID below.

 **NOTE:** Please allow four to six weeks for a tax records request to be processed, when using the REV-467. Taxpayer records can be accessed 24/7 with an online myPATH account. To do so, please visit mypath.pa.gov. If you currently do not have a myPATH account, you can sign up by clicking on the link to create a new account.

REV-467 cannot be used to request inheritance tax records. Inheritance tax information should be obtained through the County Register of Wills office where the tax returns were filed.

Canadian and other citizenships are required to submit the REV-467, when requesting taxpayer records, and cannot sign up for a myPATH account.

The fill-in form must be downloaded to your computer prior to completing. Please type or print neatly in blue or black ink.

ACCEPTABLE FORMS OF ID

Attach a copy of either a valid state issued driver's license, valid state issued photo ID, or valid passport with proof of address when submitting the request for tax records using the REV-467. If there is an authorized change of address card, a copy of the card will also be required.

ACCEPTABLE DOCUMENTATION

If someone other than the taxpayer is making the request in Section II, they must submit acceptable documentation for the authorization to request the release of the tax records. This can be a Power of Attorney on tax matters (REV-677) or, if the taxpayer is deceased, sufficient evidence to establish that the requester is authorized to act on behalf of the taxpayer's estate.

SUBMIT YOUR REQUEST

Submit requests with copy of required ID and acceptable authorization documentation by email or mail.

Email: ra-rvpa-rvdisclosure@pa.gov

Mail: **ATTN: DISCLOSURE OFFICE**
PA DEPARTMENT OF REVENUE
PO BOX 281200
HARRISBURG PA 17128-1200

LINE INSTRUCTIONS

SECTION I

DESIGNATION OF INDIVIDUAL TO RECEIVE TAX RECORDS

The designation identifies to the PA Department of Revenue the individual to whom the PA Department of Revenue will release the tax records or the authorized 3rd party designation.

FULL LEGAL NAME OF DESIGNATED INDIVIDUAL

If the taxpayer authorizes the release of tax records to an agency or firm (such as a government agency, scholarship board, or mortgage lender), they must provide the full legal name and current valid photo ID of the designated individual to whom the records will be released.

TELEPHONE NUMBER

Enter the area code and telephone number where the department can reach you during business hours.

AGENCY OR FIRM

If an agency or firm is requesting the records, enter the legal name for the agency or firm.

EMAIL ADDRESS

Enter the email address for the designated individual where the records are to be sent. If an email address is included on the form, the records will be provided via email unless noted otherwise.

MAILING ADDRESS

Enter the mailing address for the designated individual where the records are to be sent. If an email address is included on the form, the records will not be mailed.

COUNTRY CODE

The country code is a two-character alphabetic abbreviation for the country of the requester's address. Codes can be found at [irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file](https://www.irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file) under the country codes menu selection. If the address is within the United States, this field may be left blank.

SECTION II

TAX RECORDS TO BE RELEASED

TAXPAYER'S NAME OR BUSINESS NAME AS SHOWN ON ORIGINAL RETURN

This designation identifies to the PA Department of Revenue the taxpayer or business name for the records that will be released.

SSN/FEIN/TAX ID

Indicate the taxpayer's Social Security number (SSN), the federal employer identification number (FEIN) that is issued by the IRS to a business entity, or department issued tax ID number.

TRADE NAME OR DBA

Enter the name by which the entity is commonly known (doing business as, trading as, also known as), if it is a name other than the legal name. If the entity has a fictitious name registered with the PA Department of State, enter it here. If the taxpayer is requesting their own records or if the trade name is the same as the legal name above, leave blank.

CURRENT ADDRESS

Provide the most current address for the taxpayer or business.

If the taxpayer's address needs to be updated with the PA Department of Revenue, please complete this process before requesting a copy of your records by:

- Access 24/7 with an online myPATH account at myPATH.pa.gov
- Contact the Customer Experience Center by calling 717-787-8201 during normal business hours, 8:00 a.m. to 5:00 p.m.

COUNTRY CODE

The country code is a two-character alphabetic abbreviation for the country of the taxpayer's current address. Codes can be found at [irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file](https://www.irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file) under the country codes menu selection. If the address is within the United States, this field may be left blank.

ADDRESS USED IN FILING RETURNS

Provide the address that was used when the return was filed.

COUNTRY CODE

The country code is a two-character alphabetic abbreviation for the country of the address that was used when the taxpayer's return was filed. Codes can be found at [irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file](https://www.irs.gov/e-file-providers/foreign-country-code-listing-for-modernized-e-file) under the country codes menu selection. If the address is within the United States, this field may be left blank.

TAX TYPE TO BE RELEASED

Enter the Pennsylvania tax type to be released, for example: personal income, trust, property tax/rent rebate, partnership, sales and use, employer withholding, or corporation.



NOTE: REV-467 cannot be used to request inheritance tax records. Inheritance tax information should be obtained through the County Register of Wills office where the tax returns were filed.

RECORD TYPE TO BE RELEASED

Enter the tax record type requested, for example: tax return, report, or schedule.

TAX PERIOD BEGIN AND END DATES

Enter the tax period begin and end dates for each tax type to be released.

SECTION III

CERTIFICATION

Corporate tax records are available for release only by an authorized officer. Partnership tax returns are available for release only by a general partner. Records for sales and use tax and employer withholding can only be released by an authorized responsible party.

NAME, SIGNATURE, TITLE, AND DATE

Type or print the full legal name of the person who completed and signed the document. Include any titles and the date it was signed.

Copies of joint returns may be furnished at the request of either the husband or the wife. Only one signature is required.