



Form 8821 Instructions

The Town will use the 8821 form to verify any questions/concerns we have regarding your tax returns submitted as part of the annual compliance. We review your taxes to confirm the majority of your income is earned in Eagle County.

About Form 8821 https://www.irs.gov/site-index-search?search=8821&field_pup_historical_1=1&field_pup_historical=1

Information about Form 8821, Tax Information Authorization, including recent updates, related forms and instructions on how to file. Form 8821 is used to authorize any designated individual, corporation, firm, organization, or partnership to inspect and/or receive confidential information in any office of the IRS for the type of tax and the years or periods listed on Form 8821.

Fill out the section information as instructed below.

1. Taxpayer Information.

Per the IRS instructions only one payer per form.

2. Appointee.

This is the Housing Coordinator as the Town of Vail representative. The attached form is filled out for your convenience.

The Town has not been assigned a CAF number yet.

IRS definition:

A CAF number is a unique nine-digit identification number and is assigned the first time you file a third party authorization with IRS. A letter is sent to you informing you of your assigned CAF number. Use your assigned CAF number on all future authorizations.

CAF numbers are different from the third party's TIN (Taxpayer Identification Number), EIN (Employer Identification Number) or PTIN (Preparer Identification Number). CAF numbers may be assigned to an individual or a business entity.

3. Tax Information.

DO NOT CHECK THE BOX. The Town is not using an Immediate Service Provider.

(a) The Town wants to confirm property ownership, rental income. The Town needs to confirm Chamonix is your primary residence. Enter the appropriate information base on your income tax return i.e. property ownership or rental schedule numbers

(b) Tax Form Number: enter the form number(s) (for example 1040, 1040EZ and any related and filed schedules with your tax return) used for your returns including any schedule numbers filed with your return dealing with property ownership/rentals.

NOTE: Per the IRS you can submit the form for up to 3 years from December 31 the year you are submitting. The Town will accept this for future years if you prefer to fill out the form only once. See i8821 Instructions for more details.

Link to IRS Forms and Publications

<https://apps.irs.gov/app/picklist/list/formsPublications.html?value=&criteria=formNumber&submitSearch=Find>

(c) Year(s) or Period(s): list the year you are submitting. Ideally it should be the year matching the compliance you are submitting. (2018 compliance, tax return 2018).

DO NOT WRITE ALL YEARS.

(d) Special Tax Matters: enter "3 a,b,c,g,h,i,l"

4. Specific Use Not Recorded on CAF. DO NOT CHECK BOX, Skip to #7

5. Disclosure of tax information.

Skip

6. Retention/revocation of prior tax information authorizations.

Skip

7. Signature of Taxpayer.

You must sign and date the authorization. If a joint return has been filed, your spouse must execute his or her own authorization on a separate Form 8821 to designate an appointee.

Form types required access:

1040 and any related and filed schedules with your tax return.

Link to IRS Forms and Publications

<https://apps.irs.gov/app/picklist/list/formsPublications.html?value=&criteria=formNumber&submitSearch=Find>

NOTES:

If you choose to fill the form out annually you are able to revoke access to the previous year submitted by checking the box under 6.