

# Preparer Fiduciary Income Tax Return Electronic Filing Waiver Request

Effective January 1, 2020, preparers who file Fiduciary Income Tax Returns for their clients must do so electronically or use this form to request a waiver to file on paper.

You are required to complete this form providing your information and include a complete list of all clients for whom you intend to file a paper Fiduciary return. To be granted a waiver the list must include the following client information:

- The complete Fiduciary/Estate/Trust's name.
- The Fiduciary/Estate/Trust's Federal Employer Identification Number (FEIN) / Account Number.

A waiver will be granted for all returns filed for a specific tax year.

## **Tax Preparer's Information**

Preparer Name: \_\_\_\_\_

Preparer Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Preparer FEIN: \_\_\_\_\_ **AND**

Preparer Tax Identification Number (PTIN): \_\_\_\_\_

Contact Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Waiver Requested for Tax Year \_\_\_\_\_

## **Reason for Waiver**

Check the reason a waiver is being requested and provide all information requested.

- No Computer
- Software Doesn't Support Electronic Filing – Provide the name of the software product being used.  
\_\_\_\_\_
- Need More Time – Provide the specific reason and the date you expect to be ready.  
\_\_\_\_\_
- No Internet Access Available in Area
- Other – State the specific reason \_\_\_\_\_  
\_\_\_\_\_

**Before submitting verify that your complete client list with all required information is included.**

**Fax to: (804) 367-3015**

**OR**

**Mail to: Virginia Department of Taxation  
Waiver Requests  
P.O. Box 27423  
Richmond, VA 232**