



**CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION**

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our services. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Purpose for disclosing information: **Financial and Tax Planning Purposes**

Name, address, and contact information to whom the information is being disclosed:

**David Demars MBA, CFP, CLU, ChFC**

**Fidelity Financial Services, Inc  
805 Frontage Road, Suite 200A  
Kenai, AK 99611  
Phone: (907) 283-3060  
Fax: (833) 487-4315**

**Demars Financial Group, LLC  
104 S Freya St, Ste 218 Lilac Flag Bldg  
Spokane, WA 99202  
Phone: (509) 536-9556  
Fax: (509) 232-6604**

**Email: [David@DemarsFinancial.com](mailto:David@DemarsFinancial.com)**

Duration of consent: \_\_\_\_\_ (if blank, then valid **One Year** from signature date)

I/We, \_\_\_\_\_, authorize \_\_\_\_\_  
\_\_\_\_\_ to disclose to David Demars MBA, CFP, CLU,  
ChFC with Fidelity Financial Services, Inc. my/our tax return information for 20 \_\_\_\_\_.

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

Please feel free to contact us at 907-283-3060 if you have questions or would like more information regarding our privacy and confidentiality policies and procedures.

*Securities offered through Crown Capital Securities, L.P., Member FINRA/SIPC  
Investment Advisory services offered through Demars Financial Group, LLC*

*No insurance products, no advisory services, and no security products are offered through Fidelity Financial Services, Inc.*

[www.YourFidelity.org](http://www.YourFidelity.org)  
[www.DemarsFinancial.com](http://www.DemarsFinancial.com)