

2023 Consent Form

Consent to Use Tax Return Information for Other Tax-Related Services

Due to IRS regulations, we must obtain your permission to use your tax return information for purposes other than the actual preparation of your tax return. Our firm provides additional tax services beyond tax preparation, including year-round tax planning and tax consultation service. We cannot provide these services to you without your written consent.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to sign this consent form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Authorization

I/We authorize the use of my tax information, at my request, for the purpose of offering the following services, including, but not limited to the following:

- Life event tax advice, including marriage, divorce, college planning, estate and trust planning, and retirement.
- Year-round tax planning, including revising estimated tax payments and adjusting W-4 withholding allowances.
- Investment planning, including the purchase, sale or exchange of real estate.
- Responding to any other tax or financial questions that may arise.
- Acquisition and disposal of stock, bonds, and other assets.

I also consent to the use of my tax information for purposes of communicating with me via newsletter, email, website, phone or other means of communicating with information or data that may be of use to me, and at my request, for the purpose of making recommendations to me, for any of the purposes listed above.

Duration of consent (defaults to one year if left blank): _____

Client's signature _____ Date _____

Spouse's 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.