



A Tax Resolution & Wealth Management Firm

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Consent for Disclosure to Avantax

Federal law requires this consent form be provided to you. 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 tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your 2023 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.

Consents

There are two (2) separate Consent for Disclosures associated with this form and each requires a response.

For both consents, you acknowledge that Avantax and its authorized third-party vendors will retain and store information in hard copy and/or electronically if shared with them for non-tax purposes as required by applicable regulations, or longer as determined in the sole discretion of Avantax.

Consent for Disclosure of 2023 Tax Return Information

The Master's Tax & Financial Services (TMT&FS) attempts to provide a holistic service to all our clients, and this includes financial services as described on our "Consent for Use ... for Financial Services" form.

Some of the tools we use to provide clients with full service are owned outside of our business. Therefore, to use those tools in serving you, we must first obtain your permission as use of those tools by us technically constitutes a disclosure of your information to that firm.

When signed below, I/we authorize TMT&FS to disclose my/our Tax Return Information, which includes but may not be limited to, all communications with a preparer of TMT&FS and any information derived or generated from Tax Return Information in connection with my 2023 Tax Return(s) ("Tax Return Information") to: (a) Avantax Investment ServicesSM, a registered broker-dealer; (b) Avantax Advisory ServicesSM, a registered investment adviser; and (c) affiliates of those entities (collectively, "Avantax"), all of which are headquartered at 3200 Olympus Blvd., Suite 100, Dallas, TX 75019. I acknowledge that I may request a limited disclosure of Tax Return Information.

I understand that Richard Ogg of TMT&FS is affiliated with Avantax as an independent contractor solely for the purpose of offering financial products and services. Avantax does not offer, provide, or supervise tax advice or tax preparation services, and any services provided by Avantax will be pursuant to a written agreement directly with the relevant Avantax entity.

Richard Ogg, Financial Advisor (California Insurance License #0G48566) – Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory ServicesSM. Placing business through Avantax Insurance AgencySM and Avantax Insurance ServicesSM.

I acknowledge that if I make an investment through Avantax that Richard Ogg will receive a part of any management fees, commissions, or other fees paid on investments I make. I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Richard Ogg.

I understand that Tax Return Information may not be disclosed by TMT&FS for any purpose other than as permitted by law and this consent document. (Additional consent disclosures may apply.)

This consent allows TMT&FS to disclose my Tax Return Information to Avantax for the purpose of providing me with information pertaining to various financial services and products, which may include, but are not limited to, financial planning, investment advice and investment products (e.g., stocks, bonds, mutual funds, insurance, and annuities). Without limiting the foregoing, this consent allows TMT&FS to load my Tax Return Information into financial planning or other software or systems owned or operated by TMT&FS or Avantax for the purpose of assessing my financial situation or providing me with potential investment recommendations, whether or not I open an account or purchase any products or services through Avantax, and whether or not such recommendations are actually made.

For Disclosure of Tax Return Information: _____ **I/we accept;** _____ **I/we decline.**

☐ Check this box to request an analysis based on your tax return information.

Consent for Disclosure of Electronic Communication

Avantax, in response to FINRA and SEC requirements, monitor all electronic communication with TMT&FS. The purpose of that monitoring is to ensure that no prohibited statements are made related to investments. This consent is not required for us to deliver to you tax related services, but without this consent we may not communicate with you electronically, either by text or email. Note that this will disclose to Avantax that you are a client of TMT&FS.

For Disclosure of Electronic Content: _____ **I/we accept;** _____ **I/we decline.**

Unless otherwise specified below, the duration of this consent is three years from the date of signature. If I prefer a more limited duration, I will specify the duration of my consent here: I specify the duration of the above consent to be _____ years from the date of signature.

Taxpayer Name	Signature	Date
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Taxpayer Name (<i>joint return</i>)	Signature	Date
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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.