



A Tax Resolution & Wealth Management Firm

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Consent for Use of 2023 Tax Return Information for Office Use

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

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. 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.

Consent

By signing below, I/we authorize The Master's Tax & Financial Services (TMT&FS) to use my/our Tax Return Information, which includes but may not be limited to, all communications with TMT&FS and any information derived or generated from 2023 Tax Return Information in connection with my 2023 Tax Return(s) for the purpose of providing me/us with items they hope are of general interest. These can include notification about a change in tax law which could impact me, a calendar for the following year, greeting cards (e.g., holiday, birthday), estimated tax reminder, newsletter, etc.

I understand that the 2023 Tax Return Information may not be disclosed or used by TMT&FS for any purpose other than as permitted by law or this consent document. (Additional signed consents, including those authorizing a disclosure, may apply.)

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.

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.