

LADD TAX & FINANCIAL SERVICES INC

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Consent for Use of Tax Return Information

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

I/We, _____, authorize Ellen Ladd, EA (“Preparer”) to use all of my Tax Return Information, which includes but may not be limited to, all communications with Preparer and any information Preparer derives or generates from Tax Return Information in connection with my _____ Tax Return(s) (“Tax Return Information”) 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).

I understand that Preparer is affiliated with H.D. Vest Investment Servicessm, a registered broker-dealer, as an independent contractor solely for the purpose of offering financial products and services.

I understand that Preparer may use all of my Tax Return Information in connection with his/her affiliation with (a) H.D. Vest Investment Servicessm; (b) H.D. Vest Advisory Servicessm, a registered investment adviser; or (c) affiliates of those entities (collectively, “HD Vest”), all of which are headquartered at 6333 N. State Highway 161, Fourth Floor, Irving, Texas 75038. HD Vest does not offer, provide or supervise tax advice or tax preparation services, and any services provided by HD Vest will be pursuant to a written agreement directly with the relevant HD Vest entity.

I understand that Ladd Tax & Financial Services Inc is not a registered broker-dealer or a registered investment adviser.

I acknowledge that if I make an investment through HD Vest that Preparer 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 Preparer.

I understand that the Tax Return Information may not be disclosed or used by Preparer for any purpose other than as permitted by this consent document.

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.