



A Tax Resolution & Wealth Management Firm

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Consent for Use of 2023 Tax Return Information for Financial Services

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

The Master's Tax & Financial Services (TMT&FS) attempts to provide a holistic service to all our clients. This extends beyond the preparation of a tax return, as a tax return is simply a reporting of your financial history for one year to the government. While assisting you with that legal requirement is of value, we can offer much more value and benefit to you through a broader look at your financial picture.

By signing below, I/we authorize TMT&FS to use all of my/our 2023 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") 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 Richard Ogg of TMT&FS is affiliated with Avantax Investment ServicesSM, a registered broker-dealer, as an independent contractor solely for the purpose of offering financial products and services.

I understand that Richard Ogg may use all of my Tax Return Information in connection with his affiliation with (a) Avantax Investment ServicesSM; (b) Avantax Advisory ServicesSM, a registered investment adviser; or (c) affiliates of those entities (collectively, "Avantax"), all of which are headquartered at 3200 Olympus Blvd., Suite 100, Dallas, TX 75019. 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.

Consent to Use Financial (2023)

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 the 2023 Tax Return Information may not be disclosed or used by TMT&FS for any purpose other than by law or as permitted by a consent document, and this consent document does not authorize any disclosure to any person or organization outside of TMT&FS. (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 |
|----------------------|------------------|-------------|
|----------------------|------------------|-------------|

| 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.