

South Beach Tax & Financial Services

Consent to Release Tax Return Information (Client Release)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. 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 . If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information.

South Beach Tax & Financial Services will **NOT** send Tax Returns to 3rd Parties. If you need a physical or digital copy of your tax return, we will provide copies to **YOU ONLY**. Our intent is to protect your personal information.

Please complete:

•Your name and address:_____

• Purpose for sending the information:_____

• If email or fax delivery is requested, provide email address or fax number:

• Describe tax return information to be disclosed (including tax periods and if it is your personal taxes, business taxes, or both)

I, _____, authorize South Beach Tax & Financial Services to send the information using the method as specified by me.

Signature:_____Date:_____

This form is valid for 30 days.

Why do I need to sign this form? Penalty for Unauthorized Disclosure or Uses IRC Sec. 7216(a) imposes criminal penalties on tax return preparers who knowingly or recklessly make unauthorized disclosures or uses of information furnished in connection with the preparation of an income tax return. A violation of IRC Sec. 7216 is a misdemeanor, with a maximum penalty of up to one year imprisonment or a fine of not more than \$1,000, or both, together with the costs of prosecution.