

Vickie Adams, CFP  
600 17<sup>th</sup> Street- Suite 2800 South  
Denver, CO 80202

### **Consent for Disclosure of Tax Return Information**

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 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.

### **Consent**

I/We, \_\_\_\_\_, authorize Vickie Adams, CFP (“Preparer”) to disclose 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 2020 Tax Return(s) (“Tax Return Information”) to: (a) Avantax Investment Services<sup>SM</sup>, a registered broker-dealer; (b) Avantax Advisory Services<sup>SM</sup>, a registered investment adviser; and (c) affiliates of those entities (collectively, “Avantax”), all of which are headquartered at 6333 N. State Highway 161, Fourth Floor, Irving, Texas 75038. I acknowledge that I may request a more limited disclosure of Tax Return Information.

I understand that Vickie Adams is not a registered broker-dealer or a registered investment adviser.

I understand that Preparer 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.

I acknowledge that if I make an investment through Avantax 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.

### **Purposes**

1. This consent allows Preparer 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 Preparer to download my Tax Return Information into financial planning or other software or systems owned or operated by Preparer 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.

2. Avantax may capture, retain, and review my electronic communications with Preparer or other people affiliated with Vickie Adams. These communications may include email and attachments which contain Tax Return Information. Avantax will protect the confidential nature of this information by disclosing it only in response to the lawful requests of United States federal or state agencies, or otherwise as required by law.

3. I understand that Avantax and its authorized third-party vendors will retain and store my Tax Return Information in hard copy and/or electronically as required by applicable regulations, or longer as determined in the sole discretion of Avantax.

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.

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<b>Taxpayer Name</b>	<b>Signature</b>	<b>Date</b>
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<b>Taxpayer Name (<i>joint return</i>)</b>	<b>Signature</b>	<b>Date</b>
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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](mailto:complaints@tigta.treas.gov).