

ALT TAX & FINANCIAL SERVICES, INC.
1101 JOLIET STREET
JANESVILLE, WI 53546
(608) 756-5919

Your Name: _____

CONSENT TO USE OF 2020 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.

For your convenience, if you give your consent, Alt Tax & Financial Services, Inc. can use the information from your tax returns for the following:

- ◆ Use your name, address, and e-mail address for tax and financial mailings such as tax newsletters, pre-scheduled tax appointment letters, and other tax and financial information.
- ◆ Use your tax return information to make recommendations of how you might reduce your tax liability.
- ◆ Use your tax return information to respond to your tax or financial questions by phone, in person, or by email contact.
- ◆ Use your tax return information to give you tax and financial advice and make tax planning recommendations.
- ◆ Dennis C. Alt, Gary J. Pankonien, and Joseph R. Valentine are also in the business of providing financial and investment services beyond tax return preparation and tax representation. If this becomes of interest to you, then you consent to the use of tax information for the purpose of making recommendations including, but not limited to, the following: Comprehensive financial services; General investment planning; Advice, Planning, and Sales related to tax-advantaged investment vehicles; Long Term Care Insurance; Sales of securities; etc. You also consent to the use of your information to complete applications if you request such products.

By signing below, I authorize the Tax Professionals and the staff of Alt Tax & Financial Services, Inc. to use the information I provide to my tax preparer during the preparation of my tax return for 2020 and any prior tax years.

Accepted By:

Your Signature

Date: _____

Spouse Signature

Date: _____

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.