

## CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, I cannot disclose or use, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. 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 I obtain your signature on this form by conditioning my services on your consent, your consent will not be valid. Because my ability to disclose your tax return information to another tax return preparer affects the level of service that I provide to you and its cost, I may change the terms of service that I provide to you if you do not sign this form. 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.

During the course of preparing your tax return, instances may arise that would cause me to request additional information from third parties. One example is contacting your financial advisor, investment portfolio manager or bank for specific information. The third party may require that I disclose certain information available from your tax return information in order to identify you within their records (your account number and/or Social Security number for example). Other instances occasionally arise for which you would like me to readily disclose information available from your tax return to third parties. One example is to satisfy bank or other financial institution requests for lending or other purposes.

If you have requested the disclosure of a complete copy of your tax return, I am required to inform you that you have the ability to request a more limited disclosure of tax return information as you may direct.

Rest assured, I and my employees take reasonable measures to protect the confidentiality of all client information. This is not intended to be an all-inclusive consent. Rather, it is intended to allow me to provide services you expect from me in a convenient manner that is within Federal and State laws.

Sandra M Rose CPA PLLC may use your return information to discuss other types of services that we can provide, including bookkeeping, accounting, payroll preparation, and consulting. Any employee of the firm may use your information to contact you to discuss those services. You hereby consent to the use by Sandra Rose CPA PLLC or any of its employees of all tax return information contained in your federal or state income tax returns for the purpose of mailing, including electronic transmission of any sort, of information pertaining to:

- newsletters
- press releases
- published articles
- upcoming seminars, webinars, podcasts
- tax law changes notifications

The tax information may not be disclosed or used by Sandra M Rose CPA PLLC for any purpose other than that permitted by this consent document.

Please note additional parties to whom you authorize disclosure of your tax information on page 2.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email to: [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov)

Please complete:

- Name and contact information to whom the information is being disclosed:

> 1) Bank, brokerage or portfolio managers as provided in client information:

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> 2) Other, as noted:

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- Purpose for forwarding information:

> 1) To obtain or clarify information from bank accounts, brokerage accounts and/or retirement accounts related to tax preparation. Examples include, but are not limited to, obtaining cost basis information related to purchases and sales of securities and obtaining interest amounts paid or received on loans pertinent to tax preparation. This information is disclosed solely to assist in the timely, convenient, and accurate preparation of your tax return.

> 2) Other purpose, as noted

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- The duration of this consent will continue as indicated below unless you notify our firm in writing to no longer disclose your tax return information to this recipient. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.:

\_\_\_ Remain in effect to the extent Sandra M Rose CPA PLLC is engaged

\_\_\_ Other: \_\_\_\_\_

I hereby consent to the disclosure of tax return information described above. (If married, both spouses must sign.)

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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