The consent

[Firm name]
[Firm address]

CONSENT TO DISCLOSE 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.

WHAT WE WOULD DISCLOSE, TO WHOM, AND WHY

You have asked [Firm name] to provide tax return information to [Recipient name, address] for the purpose of [purpose, for example: supporting your application for a mortgage loan]. If you would like us to make this disclosure, please check the box below, and sign and date this consent.

[Include where the disclosure is of an entire return:] You may ask us to disclose less than your entire return, and we will disclose only the information you direct.

☐ I, [Taxpayer name(s)], authorize [Firm name] to disclose to [Recipient name] the following tax return information: [for example, copies of my Form 1040, with all schedules, for tax years [year] and [year], as filed], for the purpose of [purpose].

This consent is valid until [date].

[INCLUDE ONLY IF THE RECIPIENT OR ANY PREPARER ASSISTING IS OUTSIDE THE UNITED STATES]

[Where your Social Security number is fully masked or redacted:] This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States.

[Where it is not, and only if both preparers maintain an adequate data protection safeguard:] This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, including your personally identifiable information such as your Social Security Number ("SSN"). Both the tax return preparer in the United States that will disclose

your SSN and the tax return preparer located outside the United States that will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, federal agencies may not be able to enforce United States laws that protect the privacy of your tax return information against a tax return preparer located outside of the United States to whom the information is disclosed.

SIGNATURE

Taxpayer: [Name]

Signature _____ Date _____

[Second taxpayer, where the information is from a joint return: Name]

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.

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