Client Consent To Use Tax Information
And Privacy Policy

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. In addition to tax preparation services, this firm is in the business of providing year round financial consultation and tax planning services. These services cannot be provided without your consent.

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. 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.

Consent to Use

I consent to the use of my tax information for purposes other than preparing my tax return. I consent for you to communicate with me via newsletter, e-mail, web site, phone, or other means with information and recommendations that may be of use to me, including but not limited to:

1. **Tax Advice.** Advisory services relating to events in my life that have tax consequences such as college, investment transactions, marriage, divorce, and retirement.

2. **Tax Planning.** Services related to planning and forecasting potential tax obligations and their estimated tax payment requirements.

3. **Retirement Tax Planning.** Services related to retirement planning, social security planning, minimum required distributions from retirement accounts and other planning services.

4. **Investment and Asset Advice.** Services relating to the tax considerations of buying, selling and exchanging property including stocks, bonds, and real estate.

5. **Other Tax and Financial Advice.** Services related to responding to your tax and financial questions.

Your Information

Your non-public personal information is collected from various sources:

- Information received from you on tax organizers, worksheets, client questionnaires, applications and other financial documentation you provide;

- Information you provide via personal interviews, telephone conversations, faxes and e-mails;

- Information about your transactions with the firm;
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf.

Non-Disclosure

Your non-public personal information is not disclosed to any person or party, except as required by law or to facilitate filing your tax return.

Upon closing your account, your non-public personal information will not be disclosed to any person or party unless required by law.

Please understand that IRS related confidentiality is limited to non-criminal tax advice. So while information you shared to provide tax services is held in strict confidence, it is not protected from the IRS by advisor-client privilege unless such consultations are with an attorney for legal advice.

Security

Access to your information is restricted in a variety of ways:

- Only to those employees who have a need to know in order to provide products or services to you;
- Physical security, electronic security safe- guards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information.

Duration of this consent:______________________
(one year from date of signature if left blank)

Name (print): ____________________ Spouse's Name:________________________

Signature: ______________________ Signature: _____________________________

Date: __________________________ 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.