

CONSENT TO USE TAX RETURN INFORMATION

Name/Address of Tax Preparer:

Name of Client: _____

Federal law requires this consent form be provided to you. Unless authorized by law, our firm cannot use, without your consent, your tax-return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our service 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.

I, the client named above, hereby consent to the use by [*name of preparer*] of the following information provided to the firm with respect to my tax-return preparation: (1) name, (2) company name (if applicable), (3) address, (4) phone number and (5) e-mail address (if applicable). The purpose of the use is the mailing, including electronic transmission, to me of newsletters, brochures, and other information pertaining to the non-tax services the firm offers and non-tax news and information that might apply to my individual situation (for example, information on accounting, financial/retirement planning, or business planning).

The tax information may not be disclosed or used by [*name of preparer*] for any purpose other than that permitted by this consent document.

This consent will be valid for a period of three years beginning on [*firm fill in date consent to begin*] and expire on [*firm fill in date consent ends*]. Alternative expiration date requested if not date specified above by the firm: _____.

Date: _____, 20____

Name (please print): _____

Signature: _____

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 e-mail at complaints@tigta.treas.gov.

This sample form is made available to your firm as a resource for developing your own consent of use form under the IRC Section 7216 regulations. It is not intended nor can it be relied on as legal advice. Firms are strongly advised to obtain the advice of legal counsel before using or disclosing tax-return related information of clients.

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