

## TAXPAYER CONSENT TO USE TAX RETURN INFORMATION

**Federal law requires that this consent form be provided to you (Client).** Unless authorized by law, Monica Haven, E.A. (EA) cannot disclose Client's tax return information to third parties for purposes other than the preparation and filing of Client's tax return without Client's consent. If Client consents to the disclosure of tax return information, federal law may not protect Client's tax return information from further use or distribution.

Client is not required to sign this form to engage EA's tax return preparation services. Because EA's ability to disclose Client's tax return information to another tax return preparer affects the tax return preparation service(s) and the associated cost(s) that EA provides, EA may decline to provide Client with tax return preparation services or change the terms (including the cost) of the tax return preparation services that EA provides if Client does not sign this form. If Client agrees to the disclosure of tax return information, Client's consent is valid for the amount of time that Client specifies. If Client does not specify the duration of the consent, the consent is valid for one year from the date of signature.

This consent to disclose may result in Client's tax return information - including Client's Social Security Number (SSN) - to be disclosed to a tax return preparer located outside the United States (US). Both the tax return preparer in the US who will disclose Client's SSN and the tax return preparer located outside the US who will receive Client's SSN maintain adequate data protection safeguards as required under IRC § 7216 to protect Client's privacy and prevent unauthorized access to information. However, if Client consents to the disclosure of information, federal agencies may not be able to enforce US privacy laws against a tax return preparer located outside the US.

By signing below, Client also consents to use of any and all tax information contained in the Client's federal tax income tax returns and all supporting schedules for purposes other than mere preparation of the Client's tax return. Client agrees to allow EA to disclose Client's tax return information (including SSN) to another tax return preparer for purposes of providing assistance in the tax preparation process. Client further consents and agrees to allow EA to communicate information and recommendations to Client via e-mail, fax, mail, phone, and in-person. Such communications may include, but are not limited to:

- **Newsletters, web-blasts, articles, seminar announcements and promotional materials** published by EA
- **Tax Advice** relating to events in Client's life such as college, marriage, divorce, business start-up, and retirement
- **Tax Planning** including forecasting potential tax obligations and computing estimated tax payments
- **Retirement Tax Planning** including Social Security benefits and distributions from retirement accounts
- **Investment and Asset Advice** related to the considerations of buying, selling and exchanging property including stocks, bonds, and real estate.
- **Other Tax and Financial Advice.**

If Client believes that tax return information has been disclosed or used improperly in a manner unauthorized by law or without Client's permission, Client may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at (800) 366-4484 or e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

<b>Duration of this consent:</b> _____ (One year from date of signature if left blank)	<b>Date:</b> _____
<b>Client Signature:</b> _____	<b>Print Name:</b> _____
<b>Spouse's Signature:</b> _____ [If married, both spouses <i>must</i> sign]	<b>Print Name:</b> _____

**Monica Haven, E.A., J.D., L.L.M.**