

Consent to Disclose Confidential Information to a Third Party

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return, or your business information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect this information from further use or distribution.

You are not required to complete this form. If you agree to the disclosure of your tax return information, your consent is valid for the length of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

We may disclose your business or personal tax return information or your business financial statement, as you request, to the entities listed below for the purpose you indicate. The disclosure may include information contained in or derived from the information furnished to Financial Planning & Tax Center in connection with the preparation of your current or prior year tax return(s). The information disclosed may also include all information contained within your tax return(s) unless you request a more limited disclosure.

ACKNOWLEDGMENT

I (We), _____ authorize Financial Planning & Tax Center LLC to disclose the information indicated below to the listed recipient.

Information to release (indicate tax year or years of appropriate forms):

- | | |
|--|---|
| ☐ Form 1040 (Individual) _____ | ☐ Financial Statements _____ |
| ☐ Form 1120S (S-Corp) _____ | ☐ Forms W-2 _____ |
| ☐ Form 1120 (Corporation) _____ | ☐ Other (please specify) _____ |
| ☐ Form 1065 (Partnership) _____ | _____ |
| ☐ I am removing all previous elections and name a new election, below (initial): _____ | |
| ☐ I am removing all previous elections. I no longer want my information shared (initial): _____ | |

Recipient: _____

Client Signature: _____ **Date:** _____

Spouse Signature (if applicable): _____ **Date:** _____

Authorization Expiration 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.

Instructions

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1. Print legibly. We are not responsible for misinterpretation of poor handwriting.
2. Print your name(s) in the “Acknowledgment” section
3. Write the tax year(s) you are requesting on the appropriate line(s)
4. Enter the recipient’s name.
5. Sign the form, both spouses must sign if you filed “Married-Filing-Jointly”.
 - a. If you are separated or divorced from your spouse for a tax year being requested, we are not legally allowed to disclose your information to any third party without your former partner’s consent
 - b. We are legally allowed to send you a paper copy of your jointly filed tax return without your former partner’s consent.
6. Enter a final date that we are allowed to disclose this information to a third party or enter “permanent” if there is no end date wanted. Once this date passes a new consent to disclose this information form will need to be completed.

Special Considerations

7. ENTER “NA” ON ALL LINES THAT ARE INTENDED TO BE BLANK. ANY CONSENT TO DISCLOSE FORM THAT IS RETURNED WITH A BLANK LINE WILL NOT BE PROCESSED AS IT IS CONSIDERED NOT IN GOOD ORDER BY THE IRS.
8. Electronic signatures, such as Adobe or DocuSign are not acceptable unless initiated through our DocuSign system with identity verification, we will be matching the signature(s) on the form with the signature(s) on both your driver’s license and previously filed tax returns
9. We can accept the form returned to us by electronic means, including fax and email
10. Business owners that must release their tax returns annually to a bank as part of their loan process may want to write “permanent” consent to disclose on file by entering
 - a. “All” for the years
 - b. “Does not expire” on the authorized expiration date
11. Financial Planning & Tax Center LLC will bill you for each copy that is sent to a third party at the current copy rate. This can be paid by credit card over the phone.
12. We will upload your documents to your portal so you can send them to as many third parties as you desire.

Return form to tax@fptc.tax.