

# EXAMPLE USE OF TAX RETURN INFORMATION CONSENT

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### [FIRM NAME] – CONSENT TO USE OF TAX RETURN INFORMATION

This consent form is required to be provided to you by federal law. Your tax return information cannot be used by [FIRM NAME] for purposes other than preparation and filing of your tax return without your consent, unless authorized by law.

You are not required to sign this consent form. If your signature is obtained by conditioning our professional services upon your consent, your consent will not be valid. Your consent to the use of your tax return information will be valid for the amount of time you specify. If a time duration is not specified by you, your consent will be valid for one year.

For all purposes which you would like to give [FIRM NAME] consent to use your tax return information, please check the applicable boxes below. **Reasons for use:**

- Use of your name, mailing address, phone number and/or email address for the purpose of [FIRM NAME] sending you newsletters, news and information, client alerts, and event invitations distribution
- Use of your personal information to provide you information regarding additional services that might be appropriate, including tax planning, estate planning, accounting, or other personal and/or business consulting

To specify the time [FIRM NAME] is authorized to use my tax return information or to deny [FIRM NAME] consent to use your tax return information, please check the appropriate box below and provide the information requested. **Consent to use:**

- I, \_\_\_\_\_, authorize the use of my tax return information by [FIRM NAME] for the purposes specified above. This authorization remains in place
  - For as long as [FIRM NAME] is engaged by me to complete my tax returns
  - for one year
  - until the following date: \_\_\_\_\_.
- I do **not** authorize [FIRM NAME] to use my tax return information. I understand and acknowledge that I will not receive newsletters, news and information, client alerts, event invitations, or information related to other services provided by [FIRM NAME].

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

You may contact the Treasury Inspector General for Tax Administration (TIGTA) if you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission. Complaints to TIGTA can be made via telephone at 1-800-366-4484; by fax at (202) 927-7018; by mail at Treasury Inspector General for Tax Administration Hotline, P.O. Box 589, Ben Franklin Station, Washington, DC 20044-0589; or email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).