

## Consent to Use Tax Return Information

I authorize, Income Tax & More, to use the information that I provide in connection with the preparation of my 2023 tax return in order to provide or determine the following:

- My eligibility for tax credits and/or IRAs or other benefits that may help lower my tax liability.
- Upon my specific request, to provide information on my 2023 tax return to my bank, mortgage company, financial company or whomever else I so designate.
- Upon my request, to provide to me via electronic media, copies of my tax documents including my 2023 Federal or State tax return as prepared by Income Tax & More to my email address \_\_\_\_\_.
- Inform me about bookkeeping, accounting, payroll or other services that Income Tax & More may be able to provide to me.
- If required, my information may be disclosed to another tax preparer who may assist in the preparation of my return.
- All of the above.

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

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. Because our ability to disclose your tax return information to another tax return preparer affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, 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.

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](mailto:complaints@tigta.treas.gov).

Income Tax & More will not use or disclose your tax information for any other purpose in connection with this consent, except as required or permitted by law.

By signing below, you specify that Income Tax & More may use the tax return information described above through the following date:

Through April 30, 2025

Through April 30, 2027

Taxpayer's signature \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's signature \_\_\_\_\_ Date: \_\_\_\_\_