

Form 2A – Consent to Disclose Tax Return Information in Context Other than the Preparation and Filing of Tax Return

Federal law requires this consent form 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. 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. 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.

We may disclose your tax return information to the entities listed below for purposes of [e.g., providing assistance with financial planning, retirement, as well as other financial services]. The disclosure may include information contained in or derived from the information furnished to [preparer/firm name] 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

The Tax Shoppe to disclose to:

my/our tax return information.

Print Client Name

Client Signature

Date Signed

Duration of Consent

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.