



# Consent to Use of Tax Information

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**Grass CPA & Associates, ps** (“we,” “us,” and “our”)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. 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 from the date of signature.

If you do not consent, then you may still have your tax return prepared and filed by us at our regular fees.

For your convenience, **Grass CPA & Associates, ps** has relationships with other service providers to aid you in your financial future. To determine whether any of these services may be of interest or benefit to you, **Grass CPA & Associates, ps** will need to use your tax return information. If you would like **Grass CPA & Associates, ps** to use your tax return information to determine whether these services are relevant to you while we are preparing your return, or subsequently, please sign and date this consent to the use of your tax return information.

- A.** gives permission to provide tax planning for future years including calculation of withholding and/or estimated payments.
- B.** gives permission to assist you in filling out financial aid forms, loan documents or other such services initiated by you.
- C.** gives permission to identify tax law changes that might affect you or your financial future and make you aware of such changes.
- D.** gives permission to identify products or services that might benefit your financial future and make you aware of such products or services by providing information and/or referrals to you.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 2015 and prior years if applicable, tax return as Specified above.

Printed name of taxpayer: \_\_\_\_\_

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse’s signature: \_\_\_\_\_ Date: \_\_\_\_\_

This consent is valid until \_\_\_\_\_

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).

# Consent to Disclosure of Tax Information



**Grass CPA & Associates, ps** (“we,” “us,” and “our”)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. 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 to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation 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 from the date of signature.

Here at **Grass CPA & Associates, ps** we will only disclose your tax information upon written your request. Both the Taxpayer and Spouse must make this request. In order to provide copies of your tax returns and/or supporting documents to third parties we would be disclosing some or all of your 2015, and prior years, if applicable, income tax return information to that third party. If you wish to limit what is released to third parties, you must submit in writing a detailed explanation of what we are allowed to release. Disclosures to third parties include disclosures to:

- A. A lending institution for the purpose of obtaining a loan or other such transaction
- B. An institute of higher learning for financial aid or other education related purposes
- C. A financial planning provider or other individual for the purpose of retirement, estate or other financial planning services.
- D. A family member, relative or designated third party you wish to have this information.

By signing below, you (including each of you if there is more than one taxpayer) acknowledge that you have read and understand the disclosure requirements. To authorize a specific disclosure, a separate agreement will be entered into outlining who, where, what, and for how long we are to disclose your information. If you are not willing to authorize us to disclose your tax information, you can still choose to have your tax return prepared and filed by us at our normal rates.

Printed name of taxpayer: \_\_\_\_\_

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Joint taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

This consent is valid until \_\_\_\_\_

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).