

## CONSENT TO RELEASE TAX RETURN INFORMATION

Federal law requires this consent form 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. 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.

**\*All parts of this form need to be completely filled out.**

**\*Each form can be used for only one entity.**

**\*The duration of each consent form is only on an as needed basis.**

**\*This form must be returned**

**\* There is a \$15.00 charge per year tax return sent**

- 1) Entity or person's name and social security number or Federal Identification number of tax returns being authorized:

Entity/Person's name \_\_\_\_\_

SSN/Federal ID# \_\_\_\_\_

- 2) Tax Form(s) and Tax Year(s) being authorized:

Tax Form(s) \_\_\_\_\_

Tax Year(s) \_\_\_\_\_

- 3) Purpose for forwarding information:

☐ Banking and/or Loan Requirements

☐ Other (Please Specify) \_\_\_\_\_

\_\_\_\_\_

- 4) Information is released to:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_ @ \_\_\_\_\_ . \_\_\_\_\_

- 5) Method of delivery for tax information:

☐ By E-mail ☐ By Mail ☐ Other \_\_\_\_\_

- 6) Contact information if Sargent, Sargent, & Bryan, Inc. will need any further information to complete the request to release your tax information:

Phone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Other: \_\_\_\_\_

I, \_\_\_\_\_, authorize Sargent, Sargent, & Bryan, Inc. to disclose to the individual(s)/company listed above (‘ Information is released to:’), my tax return information for the person or entities listed above.

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by the law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-336-4484 or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

**OFFICE USE:**

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

Time sent: \_\_\_\_\_

Initials: \_\_\_\_\_