

[Your firm name and logo]

[Firm name]

[Firm address]

Consent to disclose tax return information

Taxpayer: [Client full name(s)]

Tax return preparer: [Firm name], [preparer name]

### **Mandatory statement**

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.

### **Voluntary 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.

### **Duration**

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. Duration you choose: [until (date) / one year].

### **Recipient and purpose**

You authorize [Firm name] to disclose the information below to [recipient name, address, loan or file number] for this purpose only: [verification of self-employment income for a mortgage application / rental application / other].

### **Information to be disclosed**

[A letter stating that we prepared your (year) and (year) federal returns and that you reported self-employment income on Schedule C / Copies of your (year) and (year) Forms 1040 with all schedules / Other: describe]. You may ask us to disclose less than this.

### **Complaints**

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).

### **Business returns (optional)**

If the information comes from a business return (Form 1065, 1120 or 1120-S), the business gives its own consent, signed by an officer or partner, naming the same recipient and purpose. The statements above are prescribed for Form 1040 filers; a business consent may use them, and must still meet 26 CFR 301.7216-3.

I consent to the disclosure described above.

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

Spouse signature (joint return): \_\_\_\_\_ Date: \_\_\_\_\_

Printed name(s): [Client full name(s)]