

# NOTICE AND CONSENT TO USE OR DISCLOSE TAX RETURN INFORMATION

## ABJ & Associates, Inc.

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Federal law requires that we obtain your written consent before we may use or disclose your tax return information for any purpose other than preparing and filing your tax return.

You are not required to provide this consent. If you do not sign this form, we will still provide tax preparation services. Your consent may be revoked at any time by sending a written request to our office. Unless you specify otherwise, this consent will remain valid for one year from the date you sign it.

### Optional – Duration of Consent:

This consent expires on: \_\_\_\_\_ (If no date is entered, the consent expires in one year.)

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## A. CONSENT TO USE TAX RETURN INFORMATION

I authorize ABJ & Associates, Inc. to use my tax return information for the specific purpose(s) indicated below:

### Common Uses (check all that apply):

- ☐ Responding to my follow-up questions about my completed tax return
  - ☐ Preparing amended returns
  - ☐ Preparing future tax projections
  - ☐ Internal review for accuracy and quality control
  - ☐ Communicating with me about tax planning opportunities
  - ☐ Preparing related state, local, or business returns
  - ☐ Preparing my FAFSA, student aid forms, or income verification
  - ☐ Preparing responses to IRS or state notices
  - ☐ Assisting me with loan or financial aid documentation I request
  - ☐ Other (specify): \_\_\_\_\_
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### Information Authorized for Use:

- ☐ My entire tax return
  - ☐ Only the items listed below: \_\_\_\_\_
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## B. CONSENT TO DISCLOSE TAX RETURN INFORMATION

I authorize ABJ & Associates, Inc. to disclose the following information to the recipient(s) listed below for the specific purpose(s) checked:

### Common Disclosures (check all that apply):

- ☐ Provide a copy of my tax return to my lender or mortgage broker
- ☐ Provide income verification to a third party I request
- ☐ Provide tax return information to my financial advisor
- ☐ Provide tax return information to my bookkeeper or payroll provider
- ☐ Provide copies of my tax documents to me electronically or by mail
- ☐ Provide a copy of my return to my attorney
- ☐ Other (specify):

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### Recipient(s) of Information:

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### Information Authorized for Disclosure:

- ☐ My entire tax return
- ☐ Only the items listed below:

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If you believe your tax return information has been used or disclosed improperly, contact the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484 or [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

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### Taxpayer Signature

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

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Spouse Signature (if applicable)

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

Signature: \_\_\_\_\_ Date: \_\_\_\_\_