



## Consent to Disclosure and Use of Tax Return Information

By and between Uhart Tax & Financial and its employees (“UTF”, “we”, and “our”) and Taxpayer(s) (“you” individually and/or collectively if more than one).

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose or use, without your written 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 and use 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 and use of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify a duration of your consent, your consent is valid for one year.

*Specified Duration: 5 years*

*UTF, in addition to tax preparation and representation, is also in the business of financial planning and investment services. Because these are not directly associated with the preparation and filing of your tax returns or within the scope of the Internal Revenue Service (IRS), your affirmative consent is needed for your tax information to be used in offering you such services. You are not obligated in any way to partake in such services which may include, but are not limited to:*

- *Comprehensive financial services, general investment planning and advice*
- *Sales of securities, including mutual funds, investment tax credit, real estate investments trust (REITs), insurance, annuities, etc.*

*Having full knowledge of your rights in these matters, you affirmatively state that you consent to your tax return information being disclosed and used for offering of such ancillary services. By providing such tax information to UTF you understand and affirmatively consent to receive such advice, knowing that such advice may include the recommendations you purchase securities, mutual fund shares, or other products or services offered, however you also hereby understand you are under no obligation to make such purchases of additional products or services. This is merely a consent to allow the disclosure and use of such information in the future should it be necessary to offer and recommend such services.*

*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 e-mail at [complaints @tigta.treas.gov](mailto:complaints@tigta.treas.gov).*

*By signing below you are agreeing to the information above. If you have any questions please contact our office immediately.*

\_\_\_\_\_  
**Taxpayer signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Spouse signature**

\_\_\_\_\_  
**Date**