

CONSENT TO USE OF TAX RETURN INFORMATION – TAX YEAR 2022

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your taxes without your consent.

If we obtain your signature on this form by conditioning our tax preparation services on your consent, the consent will not be valid, therefore, you are not required to complete this form to engage our tax preparation services.

What does all of this mean?

- If you want to be able to receive tax advice from Exemplar Accounting & Tax Advisors, we need your consent on this form. Please check the box authorizing your consent and the box next to Tax Advice below. If you do not consent to this, your taxes will be prepared and submitted, but no advice can be given.
- For your convenience, Exemplar Accounting & Tax Advisors has entered into an agreement with Exemplar Financial Network, LLC, a wealth management firm, to provide a specific service. If you are not already an existing client and are interested in potentially discussing tax planning and/or investment and financial planning advice with a wealth advisor and want us to share your tax information with Exemplar Financial Network, LLC to determine eligibility, we need your consent on this form. Please check the box authorizing your consent and the box next to Tax planning, investment and financial planning advice below.
- If you are not interested in any of these (tax advice, tax planning, investment and financial planning advice), please check the corresponding box below and sign/date this form.

I **authorize** Exemplar Accounting & Tax Advisors to use the information I provide during the preparation of my 2022 tax return for the following:

Tax planning, investment and/or financial planning advice

I **do not authorize** Exemplar Accounting & Tax Advisors to use the information I provided during the preparation of my 2022 tax return for anything other than tax preparation and the filing of my tax returns.

Taxpayer Signature(s): _____

Date Signed: _____

This signed form is valid for one year from signature date.

 **SIGN HERE
PLEASE!**