



STEPHENSON
& WARNER, INC.
CERTIFIED
PUBLIC
ACCOUNTANTS

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Federal law requires this consent form 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.

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 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.

I, _____, authorize Stephenson and Warner, Inc. to disclose to _____ that portion of my tax return information for tax year(s) _____ (including my entire return) that is necessary for them to complete their required task. I understand I have the right to limit the consent to specific information, not just authorize disclosure or use of the entire return. Recognizing that right, I consent to the use of my entire tax return.

Duration of consent (if other than one year): _____

Signature: _____ Date: _____

Last 4 digits of SSN (for verification purposes) # ____ _

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.



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For your convenience, we have entered into arrangements with certain banks regarding the provision of Individual Retirement Accounts (IRAs). To determine whether this service may be of interest to you, we will need to use your tax return information. If you would like us to use your tax return information to determine whether this service is relevant to you, please check the following box and sign and date this consent form.

I, _____, authorize _____ to use the information I provide to **Stephenson and Warner, Inc.** during the preparation of my tax return, including my entire return, to determine whether to offer me an opportunity to invest in an IRA. I understand I have the right to limit the consent to specific information, not just authorize use of the entire return. Recognizing that right, I consent to the use of my entire tax return.

Signature: _____ Date: _____

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