

# CPA Client Tax Information Disclosure Consent Form

## Consent to Disclosure of Tax Return Information

Federal law requires this consent form to 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 disclosure.

## 1. Taxpayer Information

Taxpayer Name (First, MI, Last):

Taxpayer Identification Number (Last 4 Digits):

Street Address:

City, State, Zip Code:

## 2. Disclosure Authorization

I authorize the CPA firm listed below to disclose my tax return information as detailed below.

CPA Firm Name:

## 3. Recipient of Disclosed Information

Please disclose my tax return information to the following recipient:

Recipient Name / Organization:

Recipient Address:

Recipient Email or Phone:

## 4. Information to be Disclosed

Tax Years / Period to be Disclosed:

Specific Information to disclose (e.g., Full Form 1040, Schedule C, W-2s):

Purpose of Disclosure (e.g., Mortgage Application, Loan Approval, Financial Planning):

## 5. Consent Duration and Expiration

This consent is valid until the date specified below, or for one year from the date of signature if no date is specified.

Consent Expiration Date (MM/DD/YYYY):

## 6. Signatures and Consent

By signing below, you, the taxpayer, authorize the disclosure of your tax return information for the periods and purposes described above.

Taxpayer Signature:

Date Signed (MM/DD/YYYY):

Printed Name:

If you are signing on behalf of a business entity, please provide your title:

Title / Capacity (e.g., President, Executor, Trustee):