

Fiduciary Tax Return Disclosure Authorization Form

Use this form to authorize the disclosure of confidential fiduciary tax return information to a designated representative. This form is for printing and physical signature.

1. Estate or Trust Information

Name of Estate or Trust:

Employer Identification Number (FEIN):

2. Fiduciary Information

Name of Fiduciary (Executor, Administrator, or Trustee):

Title of Fiduciary (e.g., Trustee, Co-Trustee, Executor):

Mailing Address:

Phone Number:

3. Authorized Representative / Appointee

Name of Representative:

Firm Name (if applicable):

Mailing Address:

Phone Number:

Email Address:

4. Tax Matters and Years Authorized

Tax Form Number (e.g., Form 1041):

Tax Year(s) or Period(s):

5. Fiduciary Signature and Authorization

By signing below, I certify that I am the fiduciary of the estate or trust listed above and have the authority to execute this disclosure authorization. I authorize the release of confidential tax disclosures to the representative named in Section 3.

Signature of Fiduciary:

Date:

MM/DD/YYYY

Printed Name of Fiduciary: