

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 or financial 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 or financial information, Federal law may not protect your tax return or financial 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 or financial 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.

The purpose of this consent is to allow _____
(*Name of Financial Planner or Former Tax Accountant*) to discuss and disclose any of _____
(*Taxpayer's Name's*), 2021-2024 tax return or financial information to Rachel E. Meredith with Banks Mountain Financial for tax planning and preparation. This consent is valid until December 31, 2025.

If in this consent you authorize the disclosure of your entire tax return or all information contained within the return, you do have the ability to request a more limited disclosure of tax return information as you may direct.

We are not allowed by Federal law to use your tax or financial information for any purpose other than to prepare your tax return unless you permit us by signing this statement.

Name: _____ (*Taxpayer's Name*)

Signature: _____

Date: _____

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.