Accurate Tax & Accounting, Ltd.
2965 Prairie Avenue · Beloit, WI 53511 · Office 608.362.1224 · Fax 608.362.1552

Consent to Release Tax Information To A Third Party
(Bank, Brokerage Firm)

Name: _____

I hereby authorize Accurate Tax & Accounting, Ltd. to release the following requested information to the following individual and/or firm: [to be completed by taxpayer]

Copies of my tax return/s for the following year/s:

☐ 2023 ☐ 2022 ☐ 2021 ☐ Other _____

OR

☐ **Discuss Tax Situations (via telephone or in person)**

This release is valid for ONE YEAR unless specified. "IF" you consent to more than the current year, please check one of the following:

☐ **Only the following years (specify) _____**

☐ **Until I withdraw my consent**

Please release tax return or information to:

Name of Person To Receive Information: _____

Name of Company: _____ Telephone #:_____

Fax Number: _____ E-Mail Address:_____

Purpose for disclosing information _____

Delivery Preference: ☐ Fax ☐ E-mail (security is not guaranteed)

If faxing, do you want a call before fax for privacy? ☐ YES ☐ NO If Yes, Phone Number: _____

_____	_____	_____
Taxpayer Signature	Printed Name	Date
_____	_____	_____
Spouse Signature	Printed Name	Date

IF MARRIED, AT LEAST ONE SIGNATURE IS NEEDED

The following information is required by the IRS to be included in this document:

1. Federal law requires this consent form 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 use or distribution.
2. You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation 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 from the date of signature.
3. 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.