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## Consent to Disclose Tax Return Information

This form is required by law, and applies to information now being provided for preparation of tax returns for the following years: 2011, (prior) \_\_\_\_\_. In this form "we" refers to Janelle and Richard Ogg of The Master's Tax & Financial Services; "you" or "your" refers to each taxpayer, whose names are:

Taxpayer: \_\_\_\_\_ Joint taxpayer: \_\_\_\_\_

"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. 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." Your consent is valid until \_\_\_\_\_ (at least April 15, 2012 recommended).

You are authorizing sharing information with \_\_\_\_\_ (relative, bookkeeper, financial planner, etc.), to facilitate completion of your tax return, or for other purposes when directed by you.

"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](mailto:complaints@tigta.treas.gov)."

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Joint taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Richard Ogg is an Investment Advisor Representative and holds California Insurance License #0G48566.

Securities offered through H.D. Vest Investment Services<sup>SM</sup>, Member SIPC.

Advisory services offered through H.D. Vest Advisory Services<sup>SM</sup>.

The Master's Tax & Financial Services is not a registered broker/dealer or independent investment advisory firm.