



# 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: 2009, (prior) \_\_\_\_\_. In this form “we” refers to Janelle and Richard Ogg of The Master’s Tax Service of Sonoma County; “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, 2011 recommended).

Richard Ogg is also in the business of providing financial and investment services beyond tax return preparation and tax representation. Richard is a Registered Representative of H.D. Vest Investment Services<sup>SM</sup>, member SIPC, an Investment Advisor Representative of H.D. Vest Advisory Services<sup>SM</sup>, and a representative for their affiliated companies, (collectively “HD Vest”), non-bank subsidiaries of Wells Fargo & Company, Irving Texas. Richard may receive cash commissions or fees for the sale of, or investment advice concerning, investment securities and financial products.

By signing this form you consent to the disclosure of relevant tax information as indicated (initial):

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Yes To Richard for the purpose of making recommendations related to comprehensive financial services. This includes but is not limited to the following: General investment planning; Advice, planning and sales related to tax-advantaged investment vehicles; Disability insurance; Life insurance; Tax-deferred annuities; Advice, planning and sales related to tax-advantaged retirement plans; Sales of securities, including mutual funds, investment tax credits, real estate investment trust (REITs), etc. You also consent to disclose to providers (e.g., HD Vest) information included on completed applications for items you choose to purchase after your decision to purchase is made. This form does not constitute an offer of any kind, nor does it mean that Richard can offer these services.

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Yes To \_\_\_\_\_ (relative, bookkeeper, financial planner, etc.), to facilitate  
 No completion of your tax return, or for other purposes when directed by you.

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“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: \_\_\_\_\_