



# Consent to Use 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 use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return."

"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).

For your convenience, if you give your consent, we can use the information from your tax return to respond to your queries or to determine whether other services might be of value to you, and therefore if we should offer them to you. This form does not constitute an offer of any kind, nor does it mean that we can offer these services.

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

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- Yes    You consent to the use of relevant tax information for the purpose of making  
 No      recommendations of how you might reduce your future tax liability.
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- Yes    You consent to the use of relevant tax information for the purpose of making  
 No      recommendations to improve your bookkeeping and record keeping.
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- Yes    Richard Ogg is in the business of providing financial and investment services beyond tax  
 No      return preparation and tax representation. You consent to the use of relevant tax  
information 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. You also consent to the use  
of your information in order to complete applications for such products.
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Certain other uses are permitted without your consent. One example is the use of tax information for the purpose of completing another tax return that you have a relationship with, such as a dependent, spouse, business, etc. Another example is the use of your name and address for tax related mailings such as reminders or newsletters.

"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: \_\_\_\_\_