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Consent to Use Tax Return Information

“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.” (In this form “you” or “your” refers to each taxpayer if more than one.) This form applies to information now being provided for preparation of tax returns for the following years: 2011, (prior) _____.

“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, 2013 is recommended).

For your convenience, with 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 suggest them to you. This form does not constitute an offer of any kind, nor does it mean that we can or will facilitate the offering of these products or services.

By signing this form you consent to the use of relevant tax information for initialed items:

____ Yes You consent to the use of relevant tax information for the purpose of making recommendations of how you might reduce your future tax liability (tax planning).

____ Yes You consent to the use of relevant tax information for the purpose of making recommendations to improve your bookkeeping and record keeping.

____ Yes You consent to the use of relevant tax information for the purpose of making recommendations related to comprehensive financial services including but not limited to: investment planning; advice, planning and sales related to tax-advantaged investment vehicles such as tax-deferred annuities or retirement plans; disability insurance; life insurance; sales of securities. See footer below.

“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.”

Taxpayer: _____ Signature: _____ Date: _____

Spouse: _____ Signature: _____ Date: _____

Revised: 26 December 2011

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

Securities offered through H.D. Vest Investment ServicesSM, Member SIPC,
Advisory services offered through H.D. Vest Advisory ServicesSM.

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