



Consent to Disclosure of 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. Tax return information shall include any and all personal and financial information located on your current year tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our tax 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.

If you sign this form and check one or more of the boxes below, you authorize Tax-Pro, Inc. to disclose the specified tax return information for the designated purposes. Insert a check mark (✓) in the corresponding box if you want to provide your consent to a specific use.

I authorize Tax-Pro, Inc to disclose relevant information I provide in connection with the preparation of my current and/or prior year tax return to:	
<input type="checkbox"/>	Obtain an Electronic Refund Product and/or Refund Anticipation Loan (collectively, a “tax refund bank product”) from Fort Knox Financial Services Corporation, d/b/a Refund Advantage, and Ohio Valley Bank Company or EPS Financial, LLC , or Republic Bank and Trust Company (collectively, the “Bank Product Provider”). To provide you with the opportunity to apply for and/or receive a tax refund bank product, we must disclose all of your prior and current year tax return information to the Bank Product Provider. You may request a more limited disclosure of tax return information, but you will not be eligible to submit a bank product application to the Bank Product Provider.
<input type="checkbox"/>	Obtain information on comprehensive financial services including, but not limited to, investment securities, insurance and annuities. To provide you with this information, Tax-Pro, Inc., must forward your tax return information to Robert A Bolduc II, d/b/a, Four Points Financial Advisors for this service. Robert A Bolduc II, d/b/a, Four Points Financial Advisors, is in the business of providing financial services beyond tax return preparation and tax representation and that your tax information can be used by said company to make recommendations to you, including, but not limited to, comprehensive financial services, life, health, disability, long term care and other insurance services, general investment advice, advice, planning and sales related to tax-advantaged investment vehicles and retirement plans, sales of securities, including stocks, bonds, mutual funds, ETFs, fixed and variable annuities, UITs.
<input type="checkbox"/>	All of the above

Valid for 3 years, 5 years or until revoked in writing.

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.

Tax-Pro, Inc will not use or disclose your tax return information for any other purpose in connection with this consent, except as required or permitted by law.

Taxpayer’s signature _____ Date: _____

Print Name _____

Spouse’s signature _____ Date: _____

Print Name _____