

# RSR Financial Resources, Inc.

## Consent to Disclose or Use Statement

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Client/Taxpayer

Many of RSR's customers come to us during and after each tax season and for one reason or another they need us to disclose information to or provide the use of their tax return information to third parties or other tax preparers. Some of these parties include but are not limited to the following: banks, lending institutions, CPA firms, legal representatives or other tax preparers either inside or outside the United States.

While it is not always necessary for you to supply a signed consent form in order for us to disclose or use your information, there are certain circumstances where it is legally required. While RSR will contact you to get your approval before acting on any third-party request, having your signed consent on file will enable us to disclose or grant the use of your information if you would otherwise not be available to execute a signed consent at the time of a third-party request.

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. 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 [comp/aints@tigta.treas.gov](mailto:comp/aints@tigta.treas.gov).

The various circumstances, one of which may apply to your particular requirements, are described in the remaining section of this document.

### **Disclosure to third party for other purpose:**

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.

**Consent to Disclose: Auxiliary Provider**

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 and, in certain limited circumstances, for purposes involving tax return preparation. 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.

**Consent to a preparer outside the United States**

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, *including your personally identifiable information such as your Social Security Number ("SSN")*. Both the tax return preparer in the United States that will disclose your SSN and the tax return preparer located outside the United States which will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. Section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, Federal agencies may not be able to enforce U.S. laws that protect the privacy of your tax return information against a tax return preparer located outside the U.S. to which the information is disclosed.

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. 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.**

Sincerely,

X \_\_\_\_\_  
Taxpayer  
Date \_\_\_\_\_

X \_\_\_\_\_  
Spouse  
Date \_\_\_\_\_

We the taxpayer(s) grant RSR Financial Resources the right to disclose or use our tax information for the current and previous \_\_\_\_\_ tax years for \_\_\_\_\_ month/years starting with the signed date of this instrument.

\_\_\_\_\_ Initial Taxpayer

\_\_\_\_\_ Initial Taxpayer (Spouse if applicable)