



# SONDRA SAFER, CPA

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## CONSENT TO DISCLOSURE OF TAX INFORMATION

The IRS has recently added provisions to the tax code that are designed to protect the confidentiality of your personal tax information and ensure that you are aware of anyone who is using your information. I am asking you to sign this document to allow me to use the information I gather from your tax return to help in analyzing your current financial circumstance so that I can make appropriate financial recommendations specific to you. This allows me to include you in any informational mailings throughout the year. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients in writing or as required by law.

Federal law requires that this consent form be provided to you. Unless authorized by law, I 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.  
*Section 301.7216-3*

You are not required to complete this form. If I obtain your signature on this form by conditioning my 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.  
*Section 301.7216-3*

**I authorize Sondra Safer to use the information I provide during the preparation of my tax return to determine whether she has appropriate solutions for me in brokerage, insurance or other advisory products.**

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Taxpayer Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Spouse Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Home Phone Number

\_\_\_\_\_  
Work Phone Number

\_\_\_\_\_  
Cell Phone Number

E-mail: \_\_\_\_\_

Valid until otherwise notified

If you believe your tax 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 e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

**Former Agent with the Internal Revenue Service**