

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. 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.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return 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 from the date of signature.

Duration of Consent (optional):

I, _____, authorize Jones, Lakin & Co, CPA, P.C. to
d i s c l o s e
to _____
for the purpose of _____.

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.

Signed by: _____

Date: _____

Directions for Completion of Disclosure Form:

1. This form has been created as a fillable pdf. This means you can type the information directly into the form on your computer.
2. In order to enter information, left click on each blank and begin typing.
3. In order to see a description of the information required in each blank, hover over each blank space with your mouse for the specific directions for that space.
 - a. In summary, the information in the form is as follows:
 - i. First line at the top of the page should be today's date.
 - ii. Below this line, in the following three lines, should be your name, street address, and then city, state, and zip code.
 - iii. Duration of Consent will be one year unless you fill in a time frame that is less than one year (i.e., six months).
 - iv. The first blank in the second-to-last paragraph is for your name.
 - v. In the next blank, enter a brief description of the tax return information you would like disclosed (i.e., 2012 income tax return for ABC Company or for John Doe).
 - vi. In the next blank, enter the name of the lender receiving the information.
 - vii. In the last blank, enter the purpose for the release of information (i.e., securing credit, refinance, etc.).
4. After you have filled in the above blank spaces, print the form and sign and date at the bottom where indicated.
5. Please deliver the completed form to our office, or fax or email the completed form using the contact information noted below.