

Client Consent To Use Tax 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 addition to tax preparation services, L.A. Bryson & Co. is in the business of providing year-round financial consultation and tax planning services. These services cannot be provided without your consent.

Consent to Use

I consent to the use of my tax information for purposes other than preparing my tax return. I consent for L.A. Bryson & Co. to communicate with me via newsletter, e-mail, web site, phone, or other means with information and recommendations that may be of use to me, including but not limited to:

Tax Advice: Advisory services relating to events in my life that have tax consequences such as college, investment transactions, marriage, divorce, and retirement.

Tax Planning: Services related to planning and forecasting potential tax obligations and their estimated tax payment requirements.

Retirement Tax Planning: Services related to retirement planning, social security planning, minimum required distributions from retirement accounts and other planning services.

Asset Advice: Services related to the tax considerations of buying and selling of real estate.

Other Tax and Financial Advice: Services related to responding to your tax and financial questions.

By signing this form, you expressly consent the use of your tax information for the purposes of providing these auxiliary tax and financial services to you. I understand L.A. Bryson & Co. is using tax information furnished by me to provide me with the services listed here.

I also understand that I may terminate this consent at any time by providing written request for termination. Except upon approval by me or as required by law L.A. Bryson & Co. will not disclose my confidential tax information to any other person for any other purpose.

I also acknowledge that I have read and understand L.A. Bryson & Companies Privacy Policy provided within this document. Please sign and date this copy where indicated. A copy will be provided for your records. **NO TAX PREPARATION WITHOUT A SIGNED CONSENT FORM.**

Duration of this consent: April 15, 2023

Name (print): _____

Spouse's Name: _____

Signature: _____

Signature: _____

Date: _____

Date: _____

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 email at complaints@tigta.treas.gov. Something