

## CONSENT TO USE OF TAX RETURN INFORMATION

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

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. 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 through December 31, 2023.

In order to provide you with a customized organizer, estimate reminder letters, newsletters, seminar invitations, etc. we need your consent to use your contact and other tax return information. Please remember, your information will **NOT** be disclosed or used by Nelson CPAs, LLC or JP Advisors, LLC for any purpose other than that permitted by this consent document. We NEVER disclose your information to a third party without your specific consent.

Taxpayer(s) authorize Nelson CPAs, LLC and JP Advisors, LLC to use the information provided to Nelson CPAs, LLC during the preparation of my tax return(s) for year(s) through the expiration of this letter. This includes my (our) entire return. This information will be used to provide the taxpayer(s) information pertaining to:

- Newsletters of Nelson CPAs, LLC and/or JP Advisors, LLC
- Press releases and published articles of Nelson CPAs, LLC and/or JP Advisors, LLC
- Upcoming seminars, webinars, and webcasts
- Nelson CPAs, LLC and/or JP Advisors, LLC promotion or hire announcements
- Information that might apply to taxpayer's individual situation

I (we) understand I (we) have the right to limit the consent to specific information, not just authorized use of the entire return. Recognizing that right, I (we) consent to the use of my entire tax return.

Alternative expiration date requested if not December 31, 2023: \_\_\_\_\_

Taxpayer Name (please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Name (please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date: \_\_\_\_\_

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](mailto:complaints@tigta.treas.gov).