

Lipsey and Associates

8229 Boone Blvd Suite 305 • Vienna, VA 22182 • 703-988-6573 • info@lipseyandassociates.com

Required Disclosure under Revenue Procedure 2013-19

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 those related to the preparation and filing of your tax return without your consent¹. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution².

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the tax return preparation service(s) that we provide to you and its (their) cost, we may decline to provide you with tax preparation services or change the terms (including the cost) of the tax return preparation services that we provide to you if you do not sign this form³. 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.

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 that 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 United States laws that protect the privacy of your tax return information against a tax return preparer located outside of the United States to whom the information is disclosed.

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.

Name(s) (please print) _____.

Signature (Taxpayer) _____ Date Signed _____

Signature (Spouse) _____ Date Signed _____

Consent Valid Until (Or Alternate Date) December 31, 2028

¹ Signing this consent form will not result in the disclosure of your personal information to anyone for any reason other than the preparation and filing of your return.

² Your tax return information is protected from further use or distribution by a legally enforceable non-disclosure agreement between us and TOA Global LLC.

³ We will provide you service regardless of whether you sign this consent form.

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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. 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 for one year.

Taxpayer hereby consents to the use by Lipsey and Associates of any and all tax return information contained in the taxpayer's federal income tax returns (Forms 1040, 1040NR, 1040A, 1040EZ, etc. and supporting schedules) for the purpose of mailing, including electronic transmission, to the taxpayer information pertaining to:

- Newsletters of accounting firm/preparer
- Newsletters of affiliated financial planning firm to the accounting firm/preparer
- Press releases and published articles of accounting firm/preparer
- Upcoming seminars, webinars, and webcasts
- Accounting firm/preparer promotion or hire announcements

The tax information may not be disclosed or used by Lipsey and Associates for any purpose other than that permitted by this consent document.

This consent will be valid for a period of six years beginning on the later of September 6, 2022 or the date this was signed and expire on December 31, 2028.

Alternative expiration date requested if not December 31, 2028: _____.

Signed this _____ day of _____, 20_____

Name(s) (please print) _____

Signature (Taxpayer) _____

Signature (Spouse) _____

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 by email at complaints@tigta.treas.gov

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Taxpayer Name(s) (please print) _____.

The above-referenced Taxpayer hereby consents to the disclosure by Lipsey and Associates, of any tax return source documents applicable to prepare your tax return for the calendar or fiscal years _____.

Taxpayer further consents to the release of tax return information for all future year tax returns until taxpayer directly Lipsey and Associates otherwise.

This consent authorizes the disclosure of tax return source documents provided by the client to a third party. However, you may request that we provide a more limited disclosure of such tax return information to the third party in accordance with your direction.

Lipsey and Associates may release such information to the following organization: **ARC Document Solutions, 8245 Boone Blvd Suite 120, Tysons VA 22182.**

Such information is being released to the party specified above for the following purposes:
Document scanning.

Such information may not be disclosed for any purpose other than that permitted by this document. Dated this _____ day of _____, _____

Signature (Taxpayer) _____ Signature (Spouse) _____

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.

¹ Signing this consent form will not result in the disclosure of your personal information to anyone for any reason other than the preparation and filing of your return.