

**Ted Smith CPA LLC**

**Client Request to Send Tax Returns and Other Information to Third Party, e.g., Lender**

Federal law requires this consent form be provided to you. Unless authorized by law, Ted Smith CPA LLC 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. If we obtain your signature on this form by conditioning our 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 your signature.

By your authorization below, you confirm that you have requested our firm to disclose your tax return information to \_\_\_\_\_ for purposes of providing assistance to you with your efforts to obtain a loan, mortgage, etc. The information disclosed may include all information contained within, or derived from, your current or prior tax return(s), unless you request in writing a more limited disclosure. This consent is for the \_\_\_\_\_ tax year(s.) Please allow two business days for processing.

Please remember Electronic PDF copies of your returns are accessible in your portal 24/7. If you wish for us to personally provide the copies to the third party there is a \$35 fee per year requested which needs paid prior to us providing the third party copies.

**ACKNOWLEDGMENT**

\_\_\_\_\_ I (We), authorize Ted Smith CPA LLC to disclose to \_\_\_\_\_ my (our) tax return information to assist with obtaining a loan/line of credit, mortgage, etc.

\_\_\_\_\_

Client (and spouse, if applicable) Signature

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

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Duration of Consent

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).