

Client's Consent to Disclose Tax Return Information to a Bank

You have (or \_\_\_\_\_ Bank on your behalf has) requested that we disclose your tax return information to the Bank for the purpose of obtaining \_\_\_\_\_.

Accordingly, we request that you provide the information requested below, and sign and date your consent to the disclosure of your tax return information.

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

This consent authorizes the disclosure of a copy of your entire tax return or all information contained within your tax return to the Bank. However, you may request that we provide a more limited disclosure of such tax return information to the Bank in accordance with your direction. Please be aware that 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.

Also note that 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.

The undersigned hereby authorizes \_\_\_\_\_ to disclose to Bank my tax return or that portion of my tax return information for the tax year(s) of \_\_\_\_\_ as requested by said Bank for the purpose of providing the services described above.

**Optional:** This consent shall be effective until \_\_\_\_\_.

Dated: \_\_\_\_\_

\_\_\_\_\_

[Printed name]

Dated: \_\_\_\_\_

\_\_\_\_\_

[Printed name]

Note: 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).