

**Susan M. Walla, CFP, EA**  
925 Harvest Drive, Suite 170  
Blue Bell, PA 19422

**Consent for Disclosure of Tax Return Information**  
**Effective for Tax Year 2023 Returns**

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 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 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. 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.

Susan M. Walla, CFP, EA, (the "Firm") and its tax preparers request your consent to disclose your Tax Return Information as described below.

**Disclosure for Compliance with Securities Laws & Regulations**

Susan M. Walla is affiliated with Avantax Wealth Management and its affiliates ("Avantax") as an independent contractor for the purpose of providing clients with financial products and services. Securities laws and regulations require Avantax to capture, retain and supervise its financial services professionals' communications related to Avantax's business. Avantax captures and retains all emails and attachments, including information that may contain tax return information between you and Susan Walla and the IRS requires all paid tax preparers to disclose this process to our tax clients. *If you wish to communicate with Susan Walla or her staff by e-mail, you are required to consent to this disclosure.* ***Without the taxpayer's consent, Susan Walla and her staff are otherwise unable to utilize email as a communication tool with tax clients (including e-mail with taxpayer's personal representatives and Zoom meeting preferences).*** Avantax will protect the confidential nature of this information by disclosing it only in response to lawful requests made by state or federal securities regulators, or otherwise as required by law.

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).

[ ] I/we **consent** to the disclosure of my/our Tax Return Information for the purpose above.

[ ] I/we **do not consent** to the disclosure of my/our Tax Return Information for the purpose above.

*I understand that any Tax Return Information communicated to the Firm via email may be disclosed for oversight purposes, and I will avoid emailing Tax Return Information in order to prevent this disclosure. I understand this also extends to excluding my personal representative's emails and excludes me from choosing Zoom as a meeting preference. If I still choose to send information to the Firm via email, I agree to hold the Firm harmless for any disclosure to Avantax that occurs.*

**Please provide all email addresses to be blocked by Susan Walla, CFP, EA**

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**Signatures**

I/we specify the duration of this consent to be 3 years, unless noted otherwise.

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Taxpayer Printed Name	Signature	Date
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Spouse Printed Name	Signature	Date
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If the Firm also prepares tax returns for your *minor* children (under age 18), please print their names below. This consent also applies to their Tax Return Information.

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