

Susan M. Walla, CFP, EA
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**Consent for Use 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 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 for one year from the date of signature.

Susan M. Walla, CFP, EA, and its tax preparers (the "Firm") request your consent to use your Tax Return Information for the purpose of providing you with information about various tax planning strategies, individual and business tax planning, estate and gift tax planning, business consulting, bookkeeping services, financial services and products, retirement planning, investment advice, investment products and services and long-term care and life insurance. The Firm will distribute information in various ways including, but not limited to: newsletter, email, postal mail, website, social media, phone, or other means of communication.

Susan M. Walla is affiliated with Avantax Wealth Management and its affiliates ("Avantax") as an independent contractor solely for the purpose of providing clients with financial products and services.

I/we **consent** to the use of my/our tax return information for this purpose.

I/we **do not consent** to the use of my/our tax return information for this purpose.

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

Taxpayer 1 Printed Name

Signature

Date

Taxpayer 2 Printed Name

Signature

Date

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.

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.