

## Consent to Use Of Tax Return Information

\_\_\_\_\_XCLUSIVE TAXES SERVICES\_\_\_\_\_ ("we," "us" and "our")

### **Printed name of Tax Preparer**

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

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. 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.

If you do not consent, then you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into arrangements with a bank to provide qualifying taxpayers with the opportunity to apply for a Refund Anticipation Loan (RAL), or a Preferred Electronic Refund Check (PERC) or an Electronic Refund Deposit (ERD). To determine whether these products may be available to you, we will need to use your tax return information by analyzing it and calculating the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 20\_\_\_\_ tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer\_\_\_\_\_

Taxpayer Signature:\_\_\_\_\_

Printed Name of Joint Taxpayer\_\_\_\_\_

Joint Taxpayer Signature:\_\_\_\_\_

## Consent to Disclosure Of Tax Return Information

\_\_\_\_\_XCLUSIVE TAXES SERVICES\_\_\_\_\_ ("we," "us"  
and "our")

(Printed name of Tax Preparer)

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). 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. 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.

In order to process your return we must disclose all of your 20\_\_ tax return information to Tax Software Solutions, LLC that we utilize in order to provide certain services.

If you will allow us to disclose your 20\_\_ tax return information to Tax Software Solutions, LLC for this purpose, sign and date your consent to the disclosure of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to Tax Software Solutions, LLC all of your 20\_\_ tax return information. If you are not willing to authorize us to share your tax information with the other firms, you can still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer\_\_\_\_\_

Taxpayer Signature:\_\_\_\_\_

Printed Name of Joint Taxpayer\_\_\_\_\_

Joint Taxpayer Signature:\_\_\_\_\_

## Consent to Disclosure Of Tax Return Information

\_\_\_\_\_XCLUSIVE TAXES SERVICES\_\_\_\_\_ ("we," "us"  
and "our")

(Printed name of Tax Preparer)

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). 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. 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.

You have indicated that you are interested in applying for a Refund Anticipation Loan (RAL) or Preferred Electronic Refund Check (PERC), collectively, a "bank product" from:

\_\_\_\_\_

(Printed name of RAL Bank)

In order to have your bank product application processed we must disclose all of your 20\_\_ tax return information to the bank listed above. You may request a more limited disclosure of tax return information, provided that you authorize disclosure of all of the information required to consider your application.

If you would like us to disclose your 20\_\_ tax return information to the bank listed above for this purpose, please sign and date this consent to the disclosure of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to the bank listed above all of your 20\_\_ tax return information so that they can evaluate and process your application for a bank product. You understand that if you are not willing to authorize us to share your tax information with the bank listed above, you will not be able to obtain a bank product from them, but you can still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer\_\_\_\_\_

Taxpayer Signature:\_\_\_\_\_

Printed Name of Joint Taxpayer\_\_\_\_\_

Joint Taxpayer Signature:\_\_\_\_\_