

## Consent to Use of Tax Return Information

At Keystone Financial Solutions, (“KFS”), protecting our clients’ privacy and the security of their personal and financial information has always been critically important. Our policies and procedures are designed to ensure that this information is protected, whether it is maintained electronically or on paper.

The IRS has established requirements governing the manner in which all tax return preparers can use the information provided to them by their tax clients. Under these regulations, we must obtain your written consent to use your tax return information for any purpose other than preparing your tax return. IRS rules require that we obtain your permission before we prepare your return. **Without your consent, we will be legally obligated to stop certain communications with you, and as a result you will not receive from us announcements regarding tax law changes and tax strategies that could possibly reduce the taxes you pay.**

### IRS Mandated Language:

“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 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 will be valid for one year from the date of signature.”

### Consent to Use Granted:

I/We, the Taxpayer, have read the above information, and by signing and dating below (both spouses must sign if a joint income tax return is filed), I/we consent to KFS’s use of my personal tax information solely for the three (3) purpose(s) stated below. I also understand that I may terminate this consent at any time by providing a written request for termination.

1. **General Information That May Be of Interest To Me/Us**, including non-tax services KFS offers its clients and non-tax news and information that might apply to my/our individual situation distributed by KFS to its clients via emails, newsletters, press releases, published articles, etc.
2. **Financial Advice**, including, but not limited to, tax planning ideas and strategies, IRA and retirement planning considerations, required minimum distributions, college planning, social security planning and other aspects of our financial life.
3. **KFS Announcements About Upcoming Seminars, Webinars, and Webcasts**

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

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

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

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).