

## **Consent to Disclosure of Tax Return Information**

William LaBroad, CPA, MBA, MST is our 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, I cannot use your tax return information 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 my tax return preparation services. If I obtain your signature on this form by conditioning my 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.

This consent authorizes the disclosure of a copy of your entire tax return or all information contained within your tax return exclusively to Daniel P. LaBroad, Financial Advisor, Gateway Financial Advisors, 154 Water Street, Newburyport, MA 01950 and 500 Winding Brook Drive, Glastonbury, CT 06033 solely for the purpose of investment, financial planning and insurance services.

If you would like me to use your tax return information to determine whether these services may be available to you while I am 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 me to disclose the information you provide to me during the preparation of your 202\_\_ tax return to Daniel P. LaBroad for the purpose of providing the services described above.

Printed Name of Taxpayer:

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

Printed Name of Joint Taxpayer:

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

**Consent terminates on or before:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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).