

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION
Consent A – General disclosure

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.

Please complete:

Purpose for disclosing information: _____

Name and address to whom the information is being disclosed:

Duration of consent: _____

I, _____, authorize Houston & Associates, LLC to

disclose to _____ my tax return information for 20____.

Signature: _____ Date: _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email to: complaints@tigta.treas.gov.

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION
Consent B - IRA, SEP, OR ROTH IRA, PURCHASE OR SALE OF INVESTMENTS

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.

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You have indicated that you are interested in obtaining information on retirement plans such as an IRA, SEP, or Roth IRA, purchase or sale of investments, managed funds accounts, and/or other advice concerning your financial investments. To provide you with this information, Houston & Associates, LLC must disclose your tax return information, as indicated below to the _____ that provides this service

If you would like Houston & Associates, LLC to disclose your tax return information to _____ providing this service, please check the corresponding box for the service in which you are interested, provide the information requested below, and sign and date your consent to disclosure of your tax return information.

I, _____ authorize Houston & Associates, LLC to disclose to _____ that portion of my tax return information for (tax year (s)) that is necessary for _____ to contact me and provide information about the following topics:

- IRA, SEP, or Roth IRA retirement plans
 - Purchase or sale of investments and managed funds accounts
 - Other (please specify)
- _____

If you approve use of your tax return information by Houston & Associates, LLC for a term of one year or (duration of consent date), please sign below.

Signature: _____

Print name: _____ Date: _____

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.