

**Authorization for Use of Tax Return Information  
to Provide other Requested Services**

**Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for any purpose 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 one year unless you specify otherwise. If you agree and wish to grant us your consent, please initial and sign where indicated.**

By signing this form below, I am aware that **Beaird Harris & Co., P.C. (“BHCO”)** also provides certain tax and consulting services beyond tax return preparation and tax representation; specifically year-round tax, business, financial and investment consultation and planning services. I hereby consent to the use of my tax information, at my request, for the purpose of making recommendations to me, including, but not limited to the following:

- Tax or financial advice and consultations related to certain life events such as marriage, divorce, birth of children, college, stock options, retirement, etc.;
- Advice related to starting or buying a business or selling an existing business;
- Advice related to making or selling various investments and the tax implications;
- Advice concerning various financial, investment, charitable giving, retirement plan contributions/distributions; asset protection, and/or estate planning matters;
- Tax planning including the preparation or revision of estimated tax payments, minimum required distributions from IRAs, etc.; and
- Responding to other tax, financial or other related questions I may have.

Having full knowledge of my rights in these matters, I affirmatively state that such additional services are an integral part of the total services for which I have engaged **BHCO**. I hereby authorize **BHCO** to use my tax return information to provide me with any tax and/or consulting advice or services which they believe I would benefit from and to provide responses to questions I may later raise related to my personal tax, business, financial or investment related matters. **I further understand that this form merely provides my consent for BHCO to use my tax return information and is not a general authorization for them to provide additional services for which I will be billed without my advance approval of such services. Please visit our website at [www.bh-co.com](http://www.bh-co.com) for additional information.**

**I understand that beyond the specific purpose of providing services I request, no tax return information will be disclosed to any other person or for any other purpose not specifically allowed by law or by my subsequent approval.**

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

Spouse Signature: \_\_\_\_\_ 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 TIGTA by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov). Please visit our website for additional information, [www.bh-co.com](http://www.bh-co.com).**