

Information Disclosure

IRS rules are pretty specific. They prohibit disclosure of your tax return information to anyone other than you unless you have authorized the release. This includes sharing your tax return information with one of your children, your lawyer, a mortgage company, etc. This is the law and was passed to protect your privacy and prohibit any unauthorized disclosures. If you want your tax return information shared with anyone, you will need to provide written authorization. The authorization should specifically authorize the disclosure of specific tax information, the applicable years, which it is to be disclosed to, who is disclosing the information, and contains your signature. A general authorization to disclose financial information may not be sufficient, so please specify tax information. Caution - once the requested information is disclosed to the person or company you authorized to receive it, there is no control over what the person or company does with the information. Again these IRS restrictions on disclosure are for your protection.

To: CC Tax Management,

From:

Date:

I, _____ **authorize** Tax Management, Inc. to disclose my tax information (please specify tax years and forms)

To: _____

Taxpayer _____ Print Name _____ Date _____
Signature

Spouse _____ Print Name _____ Date _____
Signature