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# Consent for Disclosure of Tax Return Information

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.

***Paul D. Voytovich, CPA*** and its tax preparers (the "Firm") request your consent to disclose your Tax Return Information as described below.

**Purpose One: Disclosure for Compliance with Securities Laws & Regulations**

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| *Why is my information being disclosed?* | **Paul D. Voytovich, CPA** are affiliated with Avantax Wealth Management and its affiliates ("Avantax") as independent contractors for the purpose of providing clients with financial products and services. The securities laws and regulations require Avantax to capture, retain and supervise its financial services professionals' communications related to Avantax's business. |
| *Where is my information being sent?* | Avantax Wealth Management ("Avantax") is composed of: (a) Avantax Investment Services℠, a registered broker-dealer; (b) Avantax Advisory Services℠, a registered investment adviser; and (c) Avantax affiliates, all of which are headquartered at 3200 Olympus Blvd, Suite 100, Dallas, TX 75019. |
| *What information will be disclosed, and how?* | Avantax captures, retains, and may review all electronic communications between you and the Firm, regardless of sender or recipient. These communications include your emails and attachments which contain Tax Return Information. Avantax will protect the confidential nature of this information by disclosing it only in response to lawful requests made by state or federal securities regulators, or otherwise as required by law. |

[ ] I/we **consent** to the disclosure of my/our Tax Return Information for the purpose above.

[ ] I/we **do not consent** to the disclosure of my/our Tax Return Information for the purpose above.

*Due to financial industry email archiving regulations, I understand that any Tax Return Information communicated to the Firm via email may be disclosed for oversight purposes, and **I will avoid emailing Tax Return Information in order to prevent this disclosure.** If I still choose to send information to the Firm via email, I agree to hold the Firm harmless for any disclosure to Avantax that occurs.*

**Purpose Two: Disclosure in Order to Discuss Tax Planning and Financial Products and Services with You**

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| *Why is my information being disclosed?* | To evaluate your financial situation and provide you with information about various tax planning strategies and financial services and products, which may include, but is not limited to: individual and business tax planning, estate and gift tax planning, business consulting, bookkeeping services, retirement planning, investment advice, investment products and services (e.g., stocks, bonds, mutual funds, insurance, and annuities) and long-term care and life insurance. Services are dependent upon the licenses held by your tax preparer. |
| *Where is my information being sent?* | Avantax Wealth Management ("Avantax") is composed of: (a) Avantax Investment Services$^{SM}$, a registered broker-dealer; (b) Avantax Advisory Services$^{SM}$, a registered investment adviser; and (c) Avantax affiliates, all of which are headquartered at 3200 Olympus Blvd, Suite 100, Dallas, TX 75019. |
| *What information will be disclosed, and how?* | All of your Tax Return Information, including communications with the Firm and any information the Firm derives or generates in connection with your tax returns. You may request a more limited disclosure of your Tax Return Information.<br><br>Your Tax Return Information will be disclosed via financial planning or other software or systems owned by the Firm or by Avantax.<br><br>Avantax and its authorized third-party vendors will retain and store your Tax Return Information in hard copy and/or electronically as required by applicable regulations, or longer as determined in the sole discretion of Avantax. |

[ ] I/we **consent** to the disclosure of my/our Tax Return Information for the purpose above.

[ ] I/we **do not consent** to the disclosure of my/our Tax Return Information for the purpose above.

**Signatures**

The duration of this consent is three years from the date of signature, unless a more limited duration is specified here: I/we specify the duration of the above consent to be ___ years from the date of signature.

______________________________________________________________________

Taxpayer 1 Printed Name Signature Date

______________________________________________________________________

Taxpayer 2 Printed Name Signature Date

If the Firm also prepares tax returns for your *minor* children (under age 18), please print their names below. This consent also applies to their Tax Return Information.

___________________________ ___________________________ ___________________________

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.