

CLIENT CONSENT FORM

for Hart & Associates, P.C.

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 purposes other than the preparation and filing of your tax return. Our firm also provides year-round financial consultation and tax planning services which cannot be provided without your consent. Furthermore, we cannot provide your tax information to other individuals or businesses without your written consent.

You are not required to complete this form. If your signature is obtained on this form by conditioning our services on your consent, your consent will not be valid. However, we can elect to not provide service. Your consent is valid for the amount of time that you specify. If you do not specify a duration, your consent is valid for one year.

Consent to Use

I consent to the use of my tax information for purposes other than preparation of my tax return, and/or release of my information to the individuals/businesses specified below. I also consent for you to communicate with me via newsletter, website, email, phone, or other means with information and recommendations that may be of use to me, including but not limited to:

- 1. Tax Advice.** Advisory services relating to events in my life that have tax consequences such as college, investment transactions, marriage, divorce, retirement, etc.
- 2. Tax Planning.** Services related to planning and forecasting potential tax obligations and their estimated tax payment requirements.
- 3. Retirement Tax Planning.** Services related to retirement planning, social security planning, minimum required distributions from retirement accounts and other planning services.
- 4. Investment and Asset Advice.** Services relating to the tax considerations of buying, selling, and exchanging property including stocks, bonds, and real estate.
- 5. Other Tax and Financial Advice.** Services related to responding to your tax and financial questions.

By signing this form, I expressly consent to the use/release of my tax information for the purposes of providing auxiliary services to me. I understand the firm is using tax information furnished by me to provide these services. I understand that I may terminate this consent at any time by providing a written request for termination. A copy of this form has been provided for your convenience.

Duration of the consent _____ (one year from date of signature if left blank)

I authorize the release of my tax information to _____

Signature: _____ Spouse Signature _____

Name (print): _____ Name (print) _____

Date: _____ Date _____

Hart & Associates, PC

Privacy Policy

Your Information

Your non-public personal information is collected from various sources:

- Information received from you on, worksheets, client questionnaires, applications and other financial documentation you provide;
- Information you provide via personal interviews, telephone conversations, faxes and e-mails;
- Information about your transactions with the firm;
- Information received about you from consumer reporting agencies if background or credit checks are conducted on your behalf.

Non-Disclosure

Your non-public personal information is not disclosed to any person or party, except as required by law or to facilitate filing your tax return.

If at some point you no longer engage our firm, your non-public personal information will not be disclosed to any person or party unless required by law.

Security

Access to your information is restricted in a variety of ways:

- Only those employees who have a need to know in order to provide products or services to you;
- Physical security, electronic safeguards and strict procedural measures consistent with federal standards are in place to protect your non-public personal information

Your privacy is important. Please trust that protecting your information is equally important. Please feel free to call at any time if you have any questions.