

**Due diligence:** As you know, in addition to being a CPA, Wendy is also a licensed financial professional and offers services in this area as well. In its efforts to protect the integrity of your personal information, the Internal Revenue Service requires firms that offer additional services besides traditional accounting services to obtain approval from clients before utilizing any of their personal information to solicit or even discuss these additional services. Attached please find a letter that requires your signature(s) in order for Wendy to discuss financial services with you. This letter is optional and will only be used in the event you wish to discuss financial services or receive information regarding financial services. If you are already a financial services client, it is not necessary to sign this form.

**CLIENT CONSENT FORM TO DISCLOSE CONFIDENTIAL INFORMATION TO THIRD PARTIES**

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.

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 the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Duration of consent (optional):

I, \_\_\_\_\_, authorize Wendy Spinner and/or

Michael Spinner of Spinner & Spinner, CPA's, P.C. to use my personal tax information, including my name(s), address, telephone numbers and financial information for the purpose of providing financial advising services, sending financial services information and contacting me (us) regarding financial programs that may be of interest to me.

No information will be released to third parties except other financial services professionals who may be working with Wendy Spinner and only after discussion with me (us).

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 Treasurer Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name