

CONSENT TO USE OF TAX RETURN INFORMATION

For the purposes of this consent form, “we,” “us,” and “our” means Maureen Connor, Pamela Towles, Andrea Bieri, Verna Collier, Denise Kean, Geri Wood, Sandra Vater, Gage Levell, Lori Barnett, Mechelle Weedin, Daniel Howard, Michael Worner

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage in our tax return preparation services. If we obtain your signature on this form by conditioning our tax preparation 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 from the date of signature.

If you do not consent, you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into an arrangement with third parties to provide qualifying taxpayers with the opportunity to apply for an Electronic Refund Disbursement Service and/or Loan product. To determine whether these products may be available to you, we will need to use your tax return information in order to calculate the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you authorize us to use the information you provide to us during the preparation of your 2025 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer: _____

Joint Taxpayer Signature: _____ Date: _____

Continue to complete pages E2 and E3, if requesting financial product.

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.

CONSENT TO DISCLOSE TAX RETURN INFORMATION

For the purposes of this consent form, “we,” “us,” and “our” means one of the following tax preparers: Maureen Connor, Pamela Towles, Andrea Bieri, Verna Collier, Denise Kean, Geri Wood, Sandra Vater, Gage Levell, Lori Barnett, Mechelle Weedin, Daniel Howard, Michael Worner

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 in our tax preparation services. If we obtain your signature on this form by conditioning our 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.

You have indicated that you are interested in receiving an Electronic Disbursement Service and/or Loan (or collectively, “Products or Services”) from Pathward, National Association. In order to provide you with the opportunity to apply for one of these Products or Services, we must disclose all of your 2025 tax return information necessary for evaluating the request to Pathward. If you request a more limited disclosure of tax return information, you will not be eligible to submit an application request for these Products or Services. If you would like us to disclose your 2025 tax return information for this purpose, please sign and date your consent to the disclosure of your tax return information.

By signing below, you authorize us to disclose to Pathward all of your 2025 tax return information necessary for the evaluation and processing of your request for a Product or Service. You understand that if you are unwilling to authorize the disclosure and sharing of your tax return information with Pathward, you will not be able to obtain a Product or Service, but you may still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed name of Joint Taxpayer (if applicable): _____

Joint Taxpayer Signature (if applicable) _____ Date: _____

Continue to complete pages E3, if requesting financial product.

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.

OPTIONAL REFUND DISBURSEMENT METHOD:

By initialing the box below, you understand and agree that: 1) You have the option to pay your tax preparer directly for services performed for you, and you are not required to purchase the Refund Deposit Account from us to receive your refund.; 2) You can mail your federal tax return directly to the IRS or electronically file your federal tax return without incurring the costs of the Refund Deposit Account; 3) The IRS does not charge a fee when disbursing your tax refund, if any, via direct deposit to your bank account or by mailing you a check. By choosing the following disbursement method, you will incur additional fees. You also understand that by making this selection you will receive your EPS Product and Service agreement documents by email or portal.

_____ Taxpayer initials

Joint Taxpayer initials _____

ACH Credit (direct deposit) to an existing bank account. The EPS Refund Deposit Account fee is \$74.90* for a federal refund deposit and \$14.00 for an additional state refund deposit. Loan disbursements are not available. If disbursement is rejected for any reason such as incorrect account information provided by you, we will disburse via paper check and the paper check fees apply.

Please enter your personal bank account information below:

Bank routing number: _____ Bank Account Number: _____

Account type: Checking Savings

* This figure reflects the EPS Bank Fee and The Drake Software Fee.

Security question: What is your mother's maiden name? _____



By checking this box and providing my mobile phone number above I would like to be notified of account information by text messaging. Receipt of text messages may be subject to charges from your service provider. To opt out of receiving text messages, please select the "opt-out" button on any text message received. (details in application)

My cell phone carrier is _____

Taxpayer

Joint Taxpayer

Date

Date