

## CONSENT TO USE OF TAX RETURN INFORMATION

For the purposes of this consent form, “we”, “us” and “our” means one of the following tax preparers: Norma J Simmons, Pamela D Towles, Maureen E Connor, Don Simmons, Andrea Bieri, Verna Collier, Barbara Hubbard, Natalie Kreiling-Ohmart or Geri Wood.

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one.) 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 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. 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, then you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into arrangements with a third party to provide qualifying taxpayers with the opportunity to apply for financial products (Loan, Electronic Refund Check or Electronic Refund Deposit). To determine whether these products may be available to you, we will need to use your tax return information by analyzing it and calculating 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 (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of the 2022 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. Please complete page E4 if you are interested in a Refund Advance.**

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](mailto:complaints@tigta.treas.gov).

## CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

For the purposes of this consent form, “we”, “us” and “our” means one of the following tax preparers: Norma J Simmons, Pamela Towles, Maureen Connor, Don Simmons, Andrea Bieri, Verna Collier, Barbara Hubbard, Natalie Kreiling-Ohmart, or Geri Wood.

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we (“we,” “us,” and “our” refers to the tax preparer and the tax preparation firm) 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 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 you are interested in receiving an Electronic Disbursement Service and/or Loan (“Products or Services”) from EPS Financial, a division of Pathward, National Association. To have your application processed by EPS Financial, we must disclose all of your 2022 tax return information. You have the right to request a more limited disclosure of tax return information, however, you will not be eligible to apply for this Product or Service. If you would like us to disclose your 2022 tax return information for this purpose, please sign and date this “Consent to Disclose your tax return information”.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to the EPS Financial all of your 2022 tax return information necessary to evaluate and process your application for the Product or Service. You understand that if you are unwilling to authorize the disclosure of your tax return information with EPS Financial, 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: \_\_\_\_\_

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](mailto:complaints@tigta.treas.gov).

## OPTIONAL REFUND DISBURSEMENT METHODS:

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 or FasterMoney Card from us; 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 any of the following disbursement methods, 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.

\_\_\_\_\_ Taxpayer initials                      Joint Taxpayer initials \_\_\_\_\_

If you wish to apply for a **REFUND ADVANCE OPTION** initial and complete p. E4 \_\_\_\_\_ Taxpayer initials

**Initial the method you choose for refund after fees withheld OR refund balance after an ADVANCE REFUND**

\_\_\_\_\_ **E1 Faster Money Discover Prepaid Card (obtained from your Tax Preparer). The EPS e-Collect fee is \$58.90\* and \$14.00 for an additional refund deposit.** Refund disbursement fees apply. No monthly fees for the first 30 days after issuance. Card will be issued to the Primary Applicant in the case of a joint return. See Cardholder Agreement for complete details, including all other fees, related to use of the prepaid card.  
\*\*\*\*\*Also complete page E4.

\_\_\_\_\_ **ACH Credit (direct deposit) to existing bank account. The EPS Refund Deposit Account fee is \$58.90\* for a federal refund deposit and \$14.00 for an additional state refund deposit.** Refund disbursement fees apply. Advance Loan disbursements 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: \_\_\_\_\_; and Account Number: \_\_\_\_\_.

Account type:     Checking     Savings

\_\_\_\_\_ **Paper Check: the EPS Refund Deposit Account fee is \$58.90\* for the first refund deposit and \$14.00 for an additional state refund deposit.** Refund disbursement fees apply. By selecting the paper check option, you authorize and direct us to issue a check payable to you and deliver it to your Tax Preparer or to your address. If you present your check more than 90 days from its issue date, or after December 31, 2023, the funds will no longer be valid.

**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