

## Disclosure Authorization

**CMBE BUSINESS SERVICES**  
**3435 CAMINO DEL RIO SOUTH SUITE 319**  
**SAN DIEGO, CA 92108**  
**(619) 449-1040**

PRINTED NAME \_\_\_\_\_

### **Authorization for use of tax return information for other purposes**

**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 same time as the Federal statute of limitations for filing your return, including extensions (generally three to four years)

I am aware that **CMBE BUSINESS SERVICES** is in the business of providing tax services beyond tax return preparation and tax representation, specifically year round consultation, tax planning and financial planning services. I hereby consent to the use of my tax information, at my request, for the purpose of making recommendations to me including but not limited to the following:

Tax advice related to life events.

Tax advice and planning related to investments and real estate.

Tax advice and planning related to tax payments, income and pension distributions.

Responding to any other tax and financial questions I may have, either personal or business.

Having full knowledge of my rights in these matters, I agree that such services are an integral part of the total tax services for which I have contracted with CMBE BUSINESS SERVICES, to include receiving any newsletter or mailing provided by them.

I understand that no tax return information will be disclosed to any other person or for any other purpose not specifically allowed by law unless authorized by me.

Your Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ 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 e-mail at [complaintstigta.treas.gov](mailto:complaintstigta.treas.gov)