

1040 Taxpayers Consent To Disclosure Tax Return Information (under Sec. 7216)

The IRS requires us to obtain consent from taxpayers relating to their usage of their tax return information. This consent form allows us to maintain IRS compliance, have efficient business operations, and serve your needs.

True Wealth utilizes the industry leader in tax automation software SurePrep, LLC (SurePrep) – a wholly-owned subsidiary of Thomson Reuters, a Fortune 500 company – to effectively and efficiently prepare your tax return securely. Certain services we may use from SurePrep require us to obtain this signed consent form. (You may opt out of this consent. However, by not consenting and allowing us to utilize SurePrep, our costs will increase. In this case, we may pass on these cost increases to you at an additional fee of \$100 per return.)

True Wealth may also provide investment advisory or wealth management services to clients in addition to tax services. In this instance, we of course need to utilize tax return information to perform investment advisory or wealth management services on your behalf. IRS requires consent to do so.

True Wealth may also provide electronic or mailed communications with the intent to educate clients about accounting, tax, investment, financial planning, lending, cash management, or other related areas and opportunities. While we do not intend these communications to be solicitations, we are listing them here out of an abundance of caution related to the required IRS disclosures of tax return information. Further, electronic communications are regulated under various federal anti-spam laws, and True Wealth includes easy and compliant unsubscribe methods within each electronic communication.

Required Disclosure per IRS Revenue Procedure 2013-19 (Provided Verbatim)

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 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. 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.

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, including your personally identifiable information such as your Social Security number (SSN). Both the tax return preparer in the United States will disclose your SSN and the tax return preparer located outside the United States will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, federal agencies may not be able to enforce United States laws that protect the privacy of your tax return information against a tax return preparer located outside of the United States to whom the information is disclosed.

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.

Acknowledgments

The duration of this consent will continue unless and until True Wealth Design, LLC is notified in writing revoking the consent. Revocation can be provided via email to kkroskey@truewealthdesign.com or via mail to 700 Ghent Road, Ste 100, Akron, OH 44333.

Your Name: _____

Spouse Name (if applicable): _____

Your Signature: _____ **Date:** _____

(Spouse's signature not required)

Resources:

Thomas Reuters Company Profile: <https://ir.thomsonreuters.com/investor-relations>

SurePrep, LLC Security Information: <https://corp.sureprep.com/learning-center/why-sureprep/security/>