

DISCLOSURE ALERT TO ALL CLIENTS OF WEINSTEIN ASSOCIATES

Please be advised that Marlena cannot ever have communication either verbal or written with anyone regarding any info about you personally or about info derived from your tax return without PRIOR WRITTEN DISCLOSURE.

Please do not have anyone call this office directly, without prior written consent by you. If timing is crucial as in final steps of a loan process, please at a minimum call us and give us permission verbally and then back it up with the written disclosure.

A disclosure form is attached, or you can use the specific one that a loan broker would have you fill out.

This disclosure is necessary for anyone you want us to speak with, not just loan brokers or banks.

THIS IS FOR YOUR PROTECTION.

Thank you in advance and best to you always,

Weinstein Associates

CONSENT FOR DISCLOSURE OF TAX INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. 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.

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.

Duration of consent (optional): One Year

I, _____, authorize _____ to disclose any and all tax information to _____ for the purpose of _____.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, contact the Treasury Inspector General for Tax Administration (TIGTA).

Taxpayer Signature: _____ Date: _____