



1751 S. Naperville Road, Suite 102, Wheaton, Illinois, 60189-5896
630-668-3030 P 630-668-2757 F www.defilippisfinancial.com
TAX RELATED EMAIL: steve@defilippisfinancial.com INVESTMENT RELATED EMAIL: stephen.defilippis@ceterafs.com

Stephen W. DeFilippis, EA, Financial Adviser
Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
National Association of Enrolled Agents

Consent to Disclose Tax Return Documents to a Third Party

The IRS has recently added provisions to the tax code that are designed to protect the confidentiality of your personal tax documents and ensure that you are aware of anyone who is using or receiving your information. It is our understanding that you have requested us to provide a third party with some or all of your tax return information.

Federal law requires that 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. 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.

The tax return documents may not be disclosed or used by DeFilippis Financial Group® for any purpose other than what is stated in this consent.

I/we, _____, (taxpayer(s)) authorize

our tax return preparer: Stephen W. DeFilippis, EA dba DeFilippis Financial Group® to disclose to:

Name of person receiving documents: _____

Relationship to client _____

Contact Phone: _____

Contact Email Address _____

Contact Fax: _____

Tax return documents requested by client (please check):

___ Tax returns ___ W-2 Forms ___ Other (please describe) _____ For tax year(s) _____

Purpose for which the consent is being furnished: _____

I/we consent to the disclosure or use of the documents for the purpose described above:

Taxpayer's signature: _____

Date: _____

Spouse's signature: _____

Date: _____

Client Address _____ Client phone number _____

I understand that this document(s) was previously provided to me upon completion of my tax returns. The fee schedule for this additional service: **\$10 for each copy of your tax return requested.**

Payment must be received before your request is processed. Fees are payable by cash or check made payable to DeFilippis Financial Group®.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by the law without your permission you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-336-4484 or by email at complaints@tigta.treas.gov.