

CONSENT TO DISCLOSURE OF TAX RETURN 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. 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. 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.

Reasons for disclosure: Please check each box to give WK consent to disclose your tax return information for the following purposes.

- Providing your name, mailing address and/or e-mail address to a printing company, mail processing company and/or e-newsletter service **strictly** for the purpose of distributing newsletters, event invitations, Client Alerts or other communications from Williams-Keepers LLC.
- Providing your tax return information to Williams-Keepers Financial Services LLC to assist in advising you on retirement plans such as an IRA, SEP, or Roth IRA, purchase or sale of investments, managed funds accounts, and otherwise advise you on your financial investments.
- Providing copies of your tax return, at your specific request, to your bank, mortgage company or other third party.

Consent to disclosure: Please check the appropriate box to give or deny WK consent to disclose your tax return information for the purposes given above.

- I consent** to disclosure of my tax return information. This authorization remains in place (check one)
 - as long as I engage Williams-Keepers LLC to complete my tax returns
 - for one year
 - until the date specified _____.

I do not consent to disclosure of my tax return information. I understand I will no longer receive newsletter, Client Alerts, and other information regarding the services provided by Williams-Keepers LLC and Williams-Keepers Financial Services.

Signed this _____ day of _____, 200_____

Name (please print) _____ Spouse's Name _____

Signature _____ Spouse's Signature _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email to: complaints@tigta.treas.gov

CONSENT TO USE OF TAX RETURN INFORMATION

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 amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Taxpayer hereby consents to the use by Williams-Keepers LLC of any and all tax return information contained in the taxpayer's federal income tax returns (Forms 1040, 1040NR, 1040A, 1040EZ, etc. and supporting schedules) for the purpose of contacting the taxpayer, by mail, telephone, e-mail or other electronic transmission, for the following reasons. *(Please check all boxes for which the consent applies.)*

- Distributing newsletters, Client Alerts, event invitations, firm news and other information
- Providing information to you regarding additional services that might be appropriate, including tax planning, estate planning, accounting, or other personal or business consulting

The tax information may not be disclosed or used by Williams-Keepers LLC for any purpose other than that permitted by this consent document.

Consent to disclosure: Please check the appropriate box to give or deny WK consent to disclose your tax return information for the purposes given above.

- I consent** to disclosure of my tax return information. This authorization remains in place (check one)
 - as long as I engage Williams-Keepers LLC to complete my tax returns
 - for one year
 - until the date specified _____.

I do not consent to disclosure of my tax return information. I understand I will no longer receive newsletter, Client Alerts, and other information regarding the services provided by Williams-Keepers LLC.

Signed this ____ day of _____, 200__

Name (please print) _____ Spouse's Name _____

Signature _____ Spouse's Signature _____

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 by email at complaints@tigta.treas.gov.