
JOHNSON FINANCIAL SERVICES, INC.

TAX PLANNING * TAX PREPARATION * ACCOUNTING
REPRESENTATION BEFORE ALL ADMINISTRATIVE
LEVELS OF THE INTERNAL REVENUE SERVICE

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PRIVACY RELEASE – INDIVIDUAL

INTERNAL REVENUE CODE SECTION 7216 DISCLOSURE OR USE OF INFORMATION BY PREPARERS OF RETURNS

This Code Section requires persons engaged in the business of preparing tax returns or providing services connected with the preparation of returns or who prepare any return for compensation may not knowingly or recklessly disclose any information provided by, or on behalf of, the taxpayer for the preparation of a return. They also may not use any information provided by or on behalf of the taxpayer for any purpose other than to prepare, or assist in preparing, the return. Anyone who discloses or improperly uses tax return information is guilty of a misdemeanor and subject to a fine of not more than \$1,000, imprisonment of not more than one year, or both.

Unless otherwise authorized by law, we cannot disclose any information without your written consent.

Please complete the following information and return to our office. Once we receive this completed form we will forward the requested information to the 3rd party named below.

The charge for faxing or emailing PDF copies is \$0.75 per page with a minimum charge of \$5.00.

Thank You

Please release the following information to:

3rd Party Firm Name: _____

Individual Name: _____

Address: _____

E-Mail: _____

Phone: _____ Fax: _____

This Privacy Release will expire in 90 days unless, by checking the box, you wish for it to remain in force until revoked, in writing via fax or US Mail.

Check the appropriate box and complete the periods:

Tax Returns (Form 1040) for the year(s) _____

Supporting Documentation for the tax year(s) _____
IE: Forms W-2, 1099-DIV, 1099-INT, 1098, etc

Other: _____

Yes No Johnson Financial Services, Inc or anyone in its employ may discuss the related information with the 3rd party firm named above?

Date: _____

Signature

Printed Name

_____-_____-_____
Social Security Number