

Privacy Policy

It has always been the policy of Albert Lea Tax Service to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us.
- Information we may receive from outside agencies, such as banks and brokerage houses, when you give them permission.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

- Requirements to comply with federal, state or local law.

- Requirements to comply with national, state or local licensing rules (ie. IRS and state revenue departments).
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable. Only the taxpayer and spouse will be provided copies of the return without your written permission/request to give copies to others.

I have read, understand, and accept the conditions of the engagement letter and privacy policies discussed above.

Client Signature _____

Date _____

CONSENT TO DISCLOSURE TAX RETURN INFORMATION

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose without your written 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 by those we give it to.

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.

I, _____, authorize Albert Lea Tax Service to disclose to (who you want us to give it to): _____ my complete tax return information for the year/s of _____ for the purpose described below.

The purpose/reason of this disclosure is: _____.

With an address/fax number/email of: _____.

This consent shall be valid for one year or until (Enter date to expire) _____.

Signature: _____ Date: _____

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 e-mail to : complaints@tigta.treas.gov.

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