

Mennenga Tax & Financial Service
814 Atlas Ave Madison, WI 53714 608-241-5678

Consent to Use Tax Return Information

Beginning January 1, 2009, income tax preparation firms are required by Tax Regulation to have on file a "Consent To Use Tax Return Information" in order to offer clients additional services.

The tax advisors at Mennenga Tax & Financial Service (MTF) use tax return information to evaluate, make suggestions, and contact clients regarding tax reduction strategies. As an additional service, clients can implement strategies through MTF. Also, Mennenga Tax & Financial Service periodically uses a mailing service, at which time client names and addresses are provided to the service.

By signing this consent, I am giving Mennenga Tax & Financial Service permission to use my tax return information to evaluate, make suggestions, and contact me regarding tax reduction strategies. If I decide to implement investment strategies, information that will be used by the broker/dealer and/or insurance companies includes: age, marital status, income level, assets, sources of income, employer, and tax bracket. This information is used to evaluate suitability for mutual funds, fixed & variable annuities, individual stocks and bonds, and other investment products. I understand that the advisor may receive a commission from the purchase of investment products.

The following three paragraphs are required by IRS to be included in this document:

1. 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.
2. 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.
3. 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, or by email at complaints@tigta.treas.gov.

This consent is valid until: (choose one)

4-30-2013, 4-30-2014, or 4-30-2019

Trustee Signature

Trust Name

Date

Trustee Printed Name

Trustee Phone Number

Tax Advisor