

CLIENT NAME(S):(type or print) _____



Annual Client Information Use Agreement

CLIFFORD & ASSOCIATES, LLC

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In addition to tax preparation services, this firm is in the business of providing year-round financial planning, and investment advisory services. Investment services are offered through S.D. Clifford Advisors, LLC. These services cannot be provided without your consent. If you consent to disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

Federal law requires this consent form be provided to you (Internal Revenue Code Sec. 7216). 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. You may terminate this consent at any time by providing a written request for termination.

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 800-366-4484, or by email at complaints@tigta.treas.gov.

Please initial all that apply:

I/WE authorize Clifford & Associates, LLC, and S.D. Clifford Advisors, LLC, to use my income tax return(s) and all related income tax information for the purpose of calculating estimated income taxes payable and such other tax, insurance, financial planning, and investment assistance as I/WE may request now or in the future.

I/WE authorize Clifford & Associates, LLC, to use my name and address, including releasing it to a printer or third-party mail house, for the purpose of facilitating Clifford & Associates, LLC, mailings, such as calendars and newsletters.

I/WE authorize Clifford & Associates, LLC, to use our email addresses for the contacting us regarding our tax returns and other related purposes as well as sending digital copies of returns or other mailings. Clifford & Associates, LLC does not sell its mailing lists.

Taxpayer Signature (A typed signature is acceptable if faxing or emailing.) **Date**

Name (Print or type)

Spouse Signature (A typed signature is acceptable if faxing or emailing.) **Date**

Name (Print or type)