

Elite Tax & Financial Services, LLC
1241 S. Main St. #6A
Wake Forest, NC 27587
919-554-9400
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www.elitetaxandfinancial.com

CUSTOMER SOLICITATION & DISCLOSURE CONSENT

You are aware that, without your express written consent, the use of your tax return information (which includes, but is not limited to, your mailing address or email address) for any purpose other than the preparation of the tax return(s) for which such tax return information was provided is prohibited.

You are aware that Lisa K. Eyrolles, EA (“Tax Preparer”), is also in the business of providing financial and investment services beyond tax return preparation and tax representation. You also understand that Tax Preparer is a Life Insurance Agent for Ann Arbor Annuity Exchange and their affiliated companies; they are headquartered at 45 Research Dr., Ann Arbor, MI 48103, telephone no. (800)321-3924. You further understand that Tax Preparer may receive cash commissions or fees for the sale of financial products. You also understand that Tax Preparer is an Independent Associate for Legal Shield, headquartered at Corporate Office, Legal Shield, One Pre-Paid Way, Ada, Oklahoma 74820, telephone no. (580)436-1234.

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 those related to the preparation and filing of your tax return. Federal law may not protect your tax return information from further use or distribution. Again, please be aware that disclosure of any kind also includes the ability of our firm to provide you with information on our other acclaimed services via your email address.

You understand that you are not required to complete this form. 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.

By signing this consent, you are authorizing your Tax Preparer to disclose to the party or parties listed below, some or all of your tax return information (as described below) for the purpose of soliciting or providing to you the following financial, investment and a legal pre-paid plan products and services which are not related to tax preparation or representation:

- Life insurance products
- Fixed income annuities
- Pre-Paid Legal Service Plans
- Identity Theft Plans

You consent to the disclosure of the following tax return information to the parties listed above.

1. Tax Return Form _____ for tax year _____
2. Tax Return Form _____ for tax year _____

You understand that if you are authorizing the disclosure of all information contained in your tax return(s). You understand that no tax return information will be disclosed to any person or for any purpose unless specifically provided for in this consent or as otherwise allowed by Federal law. You understand that by signing this Consent you are under no obligation to follow any future financial recommendations made to you or to purchase any products or services offered to you by or through any third party or Tax Preparer or Ann Arbor Annuities or Legal Shield.

If you believe your tax return information has been disclosed or used improperly in a manner not authorized 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.

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** NOTE - for a jointly filed tax return, BOTH TAXPAYER'S signature are required.

Taxpayer Signature

Spouse – (if applicable) Signature

Taxpayer Name (Printed)

Spouse Name (Printed)

Date Signed by Taxpayer

Date Signed by Spouse