Client Authorization to Release Information

Client Name: _____ Date: _____

Release Information Designated Below To the Following Third-Party:

Third Party Name: _____ Attn: _____
Address: _____ E-Mail: _____
_____ Fax #: _____
Phone: _____

I hereby authorize Jellison CPA to release the following information to the above referenced Third-Party. By signing, I understand that my information will be sent via mail, e-mail, fax or secure portal. Also, if needed, I am authorizing Jellison CPA permission to answer questions of the Third-Party about the information I have authorized to be released. I also authorize Jellison CPA to discuss with the Third Party any item as it relates to either tax or financial planning. I understand that I may be obligated to compensate Jellison CPA for all the time expended and reimburse for all out-of-pocket expenditures related to the release of this requested information.

This authorization will be valid in original or copy form. This authorization is to remain effective until such time, if any, that Jellison CPA receives, in writing, an update or change to this form. Jellison CPA reserves the right to decline, at its sole discretion, my request for release of information to any Third Party.

Designation of Information to Be Released (Please check all that apply):

- ☐ Individual Income Tax Return – Year(s) _____
- ☐ Corporate Income Tax Return – Year(s) Ending _____
- ☐ Financial Statements – Year(s) Ending _____
- ☐ Payroll Return(s) for Workman's Comp Audit – Period(s) _____
- ☐ Other (Specify) _____

By my signature below, I certified that I have the authority to execute this form and am currently authorized signer/owner/or other authorized representative for the below named individual/entity and that I agree to indemnify Jellison CPA against any liability related to improper release of any information in regards to this release.

Authorizing Signature: _____Date: _____
Spouse Signature: _____Date: _____
Company (if applicable): _____

Confidential-For Internal Jellison CPA, Use Only

IRS Circular 230 Disclosure

To ensure compliance with requirements imposed by the IRS, please be advised that any tax advise contained in this communication (including any attachments) was not intended or written by practitioner to be used, and cannot be used, for the purposes of (1) avoiding penalties under the Internal Revenue Code or (2) promoting, marketing or recommending to another party any transaction or matter addressed herein.