

Winfree & Associates, Inc.

CONSENT TO USE TAX RETURN INFORMATION

In accordance with Treasury Regulation
Sec. 301.7216-3 and Revenue Procedure 2013-14

This consent allows Winfree & Associates, Inc. to provide you with superior service. By combining tax related information and investment material the staff will strive to provide the best service to meet your individual needs.

Federal law requires this consent form be provided to you. Unless authorized, by law we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax preparation services. If we obtain your signature on this form by conditioning our tax preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time you specify. If you do not specify the duration of your consent, your consent is valid for five years from the date of signature.

If you and your spouse would like Winfree & Associates, Inc., and/or Winfree Insurance & Financial Services to use your 2019 tax return information to determine whether this service is relevant to you, initial next to the authorization declaration below and sign and date this consent to use your 2019 tax return information.

I/We, hereby and consent to the disclosure of my/our tax return and accompanying supplemental information to Winfree & Associates, Inc., and/or Winfree Insurance & Financial Services, LLC/Step Up Wealth Management, for the purpose of advising on investment, financial planning, advisory services, and all other related services.

Initial here

_____ I/We _____ authorize Winfree & Associates, Inc., and/or Winfree Insurance & Financial Services, LLC/Step Up Wealth Management to use the information provided to Winfree & Associates, Inc., during the preparation of my/our 2019 tax return.

This consent is valid for 5 years from the date of signing.

Taxpayer: _____ Date: _____
Spouse: _____ Date: _____
Witness: _____

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