



BeaconTax.org

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A Division of The Life Financial Group, Inc.

CONSENT TO USE FORM

Federal law requires this consent form be provided to you. 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 service 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.

Taxpayer hereby consents to the use by The LIFE Financial Group, Inc., DBA Beacon Tax & Accounting Services of any and all tax return information contained in the taxpayer's federal income tax returns (Forms 1040, 1040NR and supporting schedules) for the below two purposes only.

1. Mailing, including electronic transmission, or phone calls to the taxpayer regarding information pertaining to:
 - Newsletters
 - Press releases and articles
 - Upcoming seminars and client events.
2. Providing financial planning, wealth management services and insurance planning to the Taxpayer.

The tax information **may not** be disclosed or used by The LIFE Financial Group, Inc., DBA Beacon Tax & Accounting Services for any purpose other than that permitted by this consent document.

This consent will be valid for your 2020 return for a period of five years beginning on January 1, 2021 and expire on December 31, 2025.

Alternative expiration date requested if not December 31, 2025: _____

Primary Taxpayer Signature: _____ Spouse Signature: _____

Print Name: _____ Print Name: _____

Date: _____ Date: _____

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 by email at complaints@tigta.treas.gov.

Beacon Tax & Accounting Services does not disclose any nonpublic personal information about our clients, without permission, to anyone except (1) as absolutely required by law or (2) as needed by our employees to provide services or products to you or (3) if you choose to utilize our secure email, the emails may be viewed by Geneos Wealth Management. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.