

# We need your response

We continue to do business as we always have – respecting your privacy while providing individualized service.

May we have your consent?



Do you have any questions?

Billings – 406.245.5136  
Bozeman – 406.556.6160  
Butte – 406.782.0451  
Helena – 406.442.1040  
Missoula – 406.721.7800  
Seattle – 206.382.9100

Anderson ZurMuehlen & Co., P.C. places a high value on your privacy and the security of your personal information. We have policies in place to safeguard the information you provide to us, whether it is in paper or electronic format.

**New federal regulations** were recently enacted to ensure all tax preparers handle their clients' information with care. The regulations require that we obtain your written consent before we use or disclose your information including your name and address for any purpose other than preparing your tax return, such as recommending services or sending you our firm newsletter.

**Enclosed are two consent forms for your review.** The forms describe the reasons why we have used or disclosed your information in the past and request your consent to continue doing so in the future. We assure you that our business practices will not change and we will continue to respect your privacy and maintain confidentiality. The only difference is that we are required by law to obtain your written permission before contacting you regarding our services.

**Please note that you are not required** to sign and return either form in order to continue doing business with Anderson ZurMuehlen. You may give your consent for all, some, or none of the situations. However, without your signed consent, we cannot contact you regarding matters that do not directly relate to your tax return. This means we would not be able to contact you to recommend services that might be of benefit to you. Also, you might not receive our newsletters, client alerts, industry newsletters, e-newsletters, event invitations, thanksgiving cards, or other Anderson ZurMuehlen news.

**To give us your consent,** please complete and *return both forms* to our office. You may hand deliver, fax, e-mail or send the forms by postal mail using the enclosed postage paid envelope. We ask that you return the forms to us prior to the completion of your tax return.



*If you have any questions regarding these consent forms, we will be happy to discuss them with you. Please contact your tax advisor.*

*You can also find additional resources, including the text of the IRS regulation, on our web site at [www.azworld.com/pages/new](http://www.azworld.com/pages/new)*

## BUSINESS CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

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 the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

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. 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.

### Reasons for Disclosure

Check each box to give Anderson ZurMuehlen & Co., P.C. consent to disclose your tax return information (including your name and address) for the following purposes.

- Providing your name, mailing address and/or e-mail address to a printing company, mail processing company and/or e-newsletter service **strictly** for the purpose of distributing newsletters, event invitations, client alerts, thanksgiving cards, or other communications from Anderson ZurMuehlen & Co., P.C.
- Upon approval from you, we will disclose selective information from your tax return to: Employee Benefit Resources (if you are their client) or to your retirement plan administrator; to your attorney; to your insurance (life, health, liability, property and casualty) agent, or any other third party designated by you.
- Providing copies of your tax return, at your specific request, to your bank or other third party.

### Consent to Disclosure

Check the appropriate box to give or deny Anderson ZurMuehlen & Co., P.C. consent to disclose your tax return information for the purposes given above.

**I consent** to disclosure of my tax return information. This authorization remains in place (check one)

- as long as I engage Anderson ZurMuehlen & Co., P.C. to complete my tax returns.
- until 2012.
- until the date specified \_\_\_\_\_.
- I do not consent** to disclosure of my tax return information. I understand I will no longer receive newsletters, client alerts, event invitations, and other communications or information regarding the services provided by Anderson ZurMuehlen & Co., P.C. or its affiliated companies.

### Consent for Related Entities or Individuals (check if applicable)

- I consent to disclosure of tax return information for all related entities or individuals for whom Anderson ZurMuehlen & Co., P.C. provides tax services.

Signed this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Name (please print) \_\_\_\_\_ Title \_\_\_\_\_

Business Name \_\_\_\_\_ Signature \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email to [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

## BUSINESS CONSENT TO USE OF TAX RETURN INFORMATION

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 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.

### Reasons for Use

Taxpayer hereby consents to the use by Anderson ZurMuehlen & Co., P.C. of any and all tax return information contained in the taxpayer's federal income tax returns (Forms 1041, 1065, 1120, 1120S, etc. and supporting schedules) for the purpose of contacting the taxpayer, by mail, telephone, e-mail or other electronic transmission, for the following reasons. *(Please check all boxes for which the consent applies.)*

- Use of name and address only for distributing newsletters, e-newsletters, client alerts, event invitations, firm news, thanksgiving cards, or other communications and information from Anderson ZurMuehlen & Co., P.C.
- Providing information to you regarding additional services that might be appropriate, including tax planning, estate planning, accounting, or other personal or business consulting.

The tax information may not be disclosed or used by Anderson ZurMuehlen & Co., P.C. for any purpose other than that permitted by this consent document.

### Consent to Use

Check the appropriate box to give or deny Anderson ZurMuehlen & Co., P.C. consent to use your tax return information for the purposes given above.

**I consent** to use of my tax return information. This authorization remains in place (check one)

- as long as I engage Anderson ZurMuehlen & Co., P.C. to complete my tax returns.
- until 2012.
- until the date specified \_\_\_\_\_.
- I do not consent** to use of my tax return information. I understand I will no longer receive newsletters, client alerts, event invitations, and other communications or information regarding the services provided by Anderson ZurMuehlen & Co., P.C. or its affiliated companies except as federal law allows.

### Consent for Related Entities or Individuals (check if applicable)

- I consent to use of tax return information for all related entities or individuals for whom Anderson ZurMuehlen & Co., P.C. provides tax services.

Signed this \_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_

Name (please print) \_\_\_\_\_ Title \_\_\_\_\_

Business Name \_\_\_\_\_ Signature \_\_\_\_\_

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, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).