



Leading Small Businesses and Individuals to Success

229 Huber Village Blvd., Suite 220 * Westerville, Ohio 43081-8075 * Telephone (614) 942-1990 * Facsimile (614) 942-1991 * www.cpaagi.com * info@cpaagi.com

DISCLOSURE AUTHORIZATION (Envision)

Client (Taxpayer) _____ SS# _____
Print Name

Client (Spouse) _____ SS# _____
Print Name

Business Name _____ EIN _____
Print Name

WHEREAS, CPA Advisory Group, Inc. (CPAAGI) provides tax and financial services for the above named Client/Business.

WHEREAS, The Client/Business agrees to allows CPAAGI to furnish Envision Consulting Group, LLC (ECG) certain confidential information relating to tax returns, personal/business financial statements, retirement information and other financial information for the purposes of financial planning.

BE IT KNOWN, that the Client/Business grants permission to CPAAGI to furnish to ECG certain confidential information and may further allow ECG the right to discuss or interview representatives of CPAAGI on the following conditions:

- 1. ECG agrees to hold confidential or proprietary information or trade secrets ("confidential information") in trust and confidence and agrees that it shall be used only for the contemplated purposes, shall not be used for any other purpose, or disclosed to any third party.
2. From time to time copies may be made and/or retained of written information or prototypes supplied by CPAAGI to ECG.
3. This agreement will not expire between the Client/Business, CPAAGI and ECG unless written communication is received from the Client/Business.
4. This Agreement and its validity, construction and effect shall be governed by the laws of Ohio.

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 sign 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 as noted above.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without 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.

AGREED AND ACCEPTED BY:

Client (Taxpayer) _____ Date _____

Client (Spouse) _____ Date _____

Officer (Business) _____ Date _____



America Counts on CPAs ®

Members of American Institute of Certified Public Accountants and Ohio Society of Certified Public Accountants