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Dear Client,

In order to provide you with the best service and value possible, we use a number of business partners outside of the firm. Our providers may have to have access to information that may be confidential. Further, it is our understanding that we must disclose all non-employee parties that are not under common control that could come in contact with confidential information. We may have to disclose certain tax return information and this letter is to request your consent to disclose the tax return information you provide us to the following firms or individuals if it should be proven necessary:

- Intuit QuickBooks, online accounting software
- Intuit ProConnect, online tax preparation software
- Intuit Practice Management, workflow software
- Intuit Time, timekeeping software
- Practice Ignition, proposal software
- Microsoft, software provider for Office 365 and SharePoint
- Rootworks LLC, our website provider and CRM
- Darte Data Consulting LLC, our contracted IT consulting service

In addition, our Firm may use the following offshore contracted service to provide tax and accounting services:

- The Outsourced Accountant, Inc., a Delaware corporation or its counterpart in the Philippines doing business as TOA Global

TOA Global is a global leader in providing offshore accounting services to accounting firms in the United States and Canada. You can find more information on TOA Global here:

- <https://toaglobal.com/>
- <https://www.linkedin.com/company/toaglobal/>

For your convenience we request that this consent be valid until December 31, 2030. If you would like the consent to be valid for a different period, please indicate so in the space provided below.

The IRS requires that the below paragraphs be included in any consent form of this type. We are not allowed to alter them in any way. Nevertheless, much of their text does not apply to the consent sought by this form. Specifically, signing this consent form will not result in the disclosure of your personal information to anyone for any reason other than the preparation and



filing of your return. Moreover, both BOSS Advisors and TOA Global are required to, and do maintain, state of the art data security systems, each of which is compliant with the IRS requirements, which can be found here: <https://www.irs.gov/pub/irs-pdf/p4557.pdf>.

Furthermore, your tax return information is protected from further use or distribution by a legally enforceable non-disclosure agreement between us and the above-mentioned companies. Finally, we will provide you service regardless of whether or not you sign this consent form.

### CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than those related to the preparation and filing of your tax return without your consent. 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. Because our ability to disclose your tax return information to another tax return preparer affects the tax return preparation services that we provide to you and their cost, we may decline to provide you with tax preparation services or change the terms (including the cost) of the tax preparation services that we provide to you if you do not sign this form. 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 from the date of signature.

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, including your personally identifiable information such as your Social Security Number ("SSN"). Both the tax return preparer in the United States that will disclose your SSN and the tax return preparer located outside the United States that will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. Section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, Federal agencies may not be able to enforce U.S. laws that protect the privacy of your tax return information against a tax return preparer located outside of the U.S. to which the information is disclosed.

The duration of this consent will continue as indicated below, unless Payne Huebsch PLC dba BOSS Advisors, an Arizona professional limited liability company ("BOSS Advisors") is notified in writing to no longer disclose your tax return information to this recipient:

☐ Remain effective to the extent BOSS Advisors is engaged

☐ Other: \_\_\_\_\_



If you (and your spouse) agree to allow BOSS Advisors to disclose your tax return information, including your SSN, to the foreign entity or entities listed below for purposes of providing assistance in the preparation of your 2021 individual tax return, please provide the information requested, sign and date your consent to the disclosure of your tax return information.

I (We) authorize Payne Huebsch PLC dba BOSS Advisors to disclose to The Outsourced Accountant, Inc., a Delaware corporation or its counterpart in the Philippines doing business as TOA Global ("TOA Global"), my (our) tax return information including my (our) SSN(s) to allow TOA Global to assist BOSS Advisors in providing me (us) with tax return preparation services.

#### Taxpayer Consent

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

#### Spouse Consent

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

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