

Jonna D. Albert Accounting & Tax, LLC

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As laws continue to tighten on the security of tax returns, social security numbers, and other personal information, our office has had to implement changes to comply and protect your information.

In some circumstances, it may be necessary for you to request your personal records be sent to a bank, attorney, or other third party. Your signature must be on file prior to our office releasing any information to any other person or entity.

I, _____, authorize the release of my:
(Initial by those documents you allow our office to release)

_____ Tax Returns - Specify years or all: _____

_____ Source Documents (W-2's, 1099's, etc.)

_____ Financial Statements

_____ Other-Specify: _____

To the following third party: _____

Client Signature: _____

Date: _____

Received By: _____