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HARTWELL & COMPANY

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Section 7216  
Individual Client

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:

- *NuWave Technology Group*, our contracted IT Consulting Services (they provide backup services and computer support).
- *Drake Software*, our Software for processing your tax return (occasionally we have to ask for assistance on complex or problem returns).
- *Redtail Technology*, our contracted client relationship management software.
- *Imaginetime*, our contracted secure portal service.
- Intuit QuickBooks, online accounting software that we use with some clients.
- *USA Financial Services*, our Microsoft Office products provider.

For your convenience we request that this consent be valid until **December 31, 2026**. 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 following three 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. 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.

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 and, in certain limited circumstances, for purposes involving tax return preparation. 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 service that we provide to you and its cost, we may decline to provide you with service or change the terms of service 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. This consent to disclose may result in your tax return information being disclosed to business partners located outside the United States, including your personally identifiable information such as your Social Security Number (“SSN”). Both the organizations in the United States that will disclose your SSN and the organizations located outside the United States which 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 US laws that protect the privacy of your tax return information against a tax return preparer located outside of the US to which the information is disclosed.

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)

Our objective has always been to provide you with superior service and if you do have any questions or concerns regarding this form, please do not hesitate to call me at 269-983-2212.

Best personal regards,

Jim Hartwell CPA CFP

I, \_\_\_\_\_ (Print Name) authorize Hartwell & Company to disclose relevant tax information as deemed necessary by Hartwell & Company to the above mentioned companies for the purpose of preparing tax returns.

\_\_\_\_\_  
Signature(s)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Consent Agreed Until

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