



AUTHORIZATION TO RELEASE INCOME TAX RETURN INFORMATION

(This form should be forwarded directly to your CPA)

Internal Revenue Code §7216 generally prohibits any person who is engaged in the business of preparing U.S. income tax returns from using information furnished to that individual for the preparation of any such return. Treasury Reg. §301.7216- 3(a)(1) provides that such tax return information can be used if written consent of the taxpayer is obtained. This document is intended to provide written consent to use your tax return information for purposes other than the preparation and filing of your return.

I/We, _____, do hereby give consent to _____ to release the following financial information:

- Individual Tax Return (Electronic Form 1040 & accompanying state forms)
- Corporate Tax Return (Electronic Form 1120 or 1120S & accompanying state forms)
- Partnership Tax Return (Electronic Form 1065 & accompanying state forms)
- Personal Financial Statement
- Other _____ for

the tax year(s) _____, to:

Company Name: **Navigant Credit Union**

Email Address: **creditdepartment@navigantcu.org**

Federal Law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information or personal financial statements to third parties for purposes other than the preparation and filing of your tax return. 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 and personal financial statements, 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.

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.

Signature

Date

Signature

Date