

**Consent to Disclose Information For Bank Product Application**

**Federal Disclosure:**

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 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, 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. The duration specified below can be changed if desired.

**Defined Terms:**

**"Tax Preparer\*":** Ultimate Tax Service Inc.  
**Address:** PO Box 1071 Muscatine IA 52761

**"Taxpayer #1":** \_\_\_\_\_  
**"Taxpayer #2":** \_\_\_\_\_  
**Address:** \_\_\_\_\_

**"Taxpayer":** Refers to both Taxpayer #1 and Taxpayer #2

**"Bank":** Santa Barbara Bank and Trust

**"Software Developer":** CCH Small Firm Services, 6 Mathis Drive, Rome, GA 30165

**"Personal Information":** Taxpayer's 2008 tax return and all information contained therein

**"PIN":** Personal identification number

**"Disclosure 1":** Tax Preparer will disclose the Personal Information to Software Developer through Software Developer's tax preparation software.

**"Disclosure 2":** The Software Developer will disclose the Personal Information to Bank.

**"Disclosures":** Refers to both Disclosure 1 and Disclosure 2

**"Purpose":** The purpose of the Disclosures is for Software Developer to transmit Taxpayer's bank product application to Bank for consideration and potentially to provide Taxpayer with a bank product (for example, Refund Anticipation Loans, Electronic Refund Checks, and/or State Electronic Refund Checks).

**CONSENT GRANTED**

I/we hereby consent to Disclosure 1 for the Purpose stated above.

I/we hereby consent to Disclosure 2 for the Purpose stated above.

I/we, the Taxpayer, have read the above information. By typing in my/our taxpayer PIN(s) and checking the boxes above, I/we hereby consent to the Disclosures for the Purpose stated above.

**Taxpayer #1 PIN:** \_\_\_\_\_

**PIN Entered Date:** \_\_\_\_\_

**Taxpayer #2 PIN:** \_\_\_\_\_

**PIN Entered Date:** \_\_\_\_\_

**Duration of Consent: 3 years**

**LIMITATION ON DISCLOSURE**

I/we do not wish to limit the scope of the Disclosure of the Personal Information unless I/we mark the box and list the limitations below.

Tax Return Disclosure Limitation: \_\_\_\_\_

**CONSENT DENIED**

I/we, the Taxpayer, have read the above information, and by typing in my/our taxpayer PIN(s) hereby **DENY** consent to the Disclosure of the Personal Information for the Purpose stated above.

**Taxpayer #1 PIN:** \_\_\_\_\_

**PIN Entered Date:** \_\_\_\_\_

**Taxpayer #2 PIN:** \_\_\_\_\_

**PIN Entered 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 email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

\* In accordance with Federal Law and Internal Revenue Code Section 7216, the term "Tax Preparer" shall mean the ERO of this electronically filed return even though it may have been prepared by someone other than the ERO.

\_\_\_\_\_  
Taxpayer #1 - Signature

\_\_\_\_\_  
Taxpayer #2 - Signature