

Davidson County Tax Coalition (DCTC)

2020 Tax Returns – 2021 Tax Season

Protecting Your Privacy & Justifying the Continuation of This Program

Print Names: Taxpayer _____ Spouse (if MFJ) _____

Your personal information is only used to prepare your return. We must, however, be able to provide a variety of process totals, like “Total Number of Returns Prepared”, to justify continuing to provide this service. This requires that we get several Consents from you. One, Regional Office, is required; the others are optional. Read the information below and initial and sign as appropriate. Ask the Intake Interviewer if you have questions or concerns.

We must have your consent to prepare your return. This is obtained on the Regional/Relational Office Consent Form. If you do not consent to these conditions, we cannot prepare your return as we do not have access to desktop-only software.

Consents to Disclose and Use tax data. Disclosure and use of this information helps us justify to our funding sources the continuing need for this program. The primary recipients of these data reports are Davidson County Government and the IRS VITA Grant office. If you do not agree to this, we will still prepare your return.

Global Carry Forward Consent will allow the more efficient completion of your return next year at any other VITA/TCE site. We will retain this completed form; copies of each consent form will be provided as part of your tax package.

Federal Disclosure (found on all four Consent Forms)

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). 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 of distribution.

You are not required to complete this form to engage our tax return preparation services, except for the Regional/Relational Office Consent. If we obtain your signature on this form by conditioning our tax return preparation 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 from the date of signature.

Regional/Relational Office Consent

Your return will be prepared over the internet using a secure connection. Your electronic information is stored with an IRS-contracted software and return transmitting company. This is true of any online tax preparation and/or e-file service you might choose to use. We cannot process your return if you do not allow us to use this service. As such, some of your information may be used to help us prepare your return at this site in the future. The software/transmitter is TaxSlayer, LLC, located in Evans, GA.

Since your tax information will be retained at TaxSlayer and this site operates under the DCTC umbrella, you must answer “Yes” on the Regional/Relational Office (RO) Consent Form (DCTC is considered to be the RO) for us to prepare your return. You are only consenting for your information to be shared internally within DCTC for the purpose of processing your return. This consent is valid for 3 years.

Grant (Initial) Taxpayer _____ Spouse (MFJ) _____ Deny (Sign) _____

Consents to Disclose and Use – The IRS requires two forms for the same basic information. **If you Deny either consent, your return cannot be Electronically Filed.** These consents are valid for one (1) year.

(initial): Grant: Taxpayer _____ Spouse _____ Deny: Taxpayer _____ Spouse: _____

Consent to Global Carry Forward will pull this year’s return data into your next year’s return prepared at any VITA/TCE site. (See also, pg 4 of Intake Sheet)

(initial): Grant: Taxpayer _____ Spouse _____ Deny: Taxpayer _____
Spouse: _____

Certification: I have reviewed the information above about retaining, disclosing, and using my tax information. I am providing a **five number digital signature** that the tax preparer will enter on the computer copies of these consents in the tax return preparation software. I understand that I will receive printed copies of these consents as part of my tax package.

Signed:
Taxpayer: _____ Date: _____ Digital Signature _____

Spouse (MFJ): _____ Date: _____ Digital Signature _____