

PREPARE + PROSPER

PERMISSION TO USE YOUR PERSONAL INFORMATION: CONSENT TO USE

Your information will not be shared with any unauthorized persons and will not be sold, given, or used for commercial purposes. We will not share personally identifying information. See below for how your information may be used.

If you do not agree to the consent below, Prepare + Prosper (P+P) cannot electronically file your return or maintain an electronic copy. However, P+P can prepare a paper return for you to mail to the IRS and Minnesota Revenue.

Consent to Use: P+P may use data containing tax return dollar amounts for marketing, fundraising or other non-fundraising activity.

Purpose: To provide reports including aggregate data to P+P funders and partners, and to analyze data to evaluate and improve P+P services.



Assisted
12,278 taxpayers
in filing taxes, free of charge



Identified + filed for
\$23.4 million in refunds
for taxpayers in Minnesota



4,734 dependents
(often children) benefited from
tax refunds



Enlisted the help of
581 volunteers
who donated 25,886 hours
filing 25,871 returns



1,311 taxpayers saved
\$1.9 million
of their refunds



184 people
are reaching financial goals in our
financial coaching program

Consent to use personal tax information

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

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. 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.

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 e-mail at complaints@tigta.treas.gov.

PREPARE + PROSPER

PERMISSION TO USE YOUR PERSONAL INFORMATION: CONSENT TO DISCLOSE

Your information will not be shared with any unauthorized persons and will not be sold, given or used for commercial purposes. We will not share personally identifying information.

If you do not agree to the consents below, Prepare + Prosper (P+P) cannot electronically file your return or maintain an electronic copy. However, P+P can prepare a paper return for you to mail to the IRS and Minnesota Revenue.

Consent to Disclose: P+P may keep an electronic copy of my tax return for 3 years.

Purpose: To carry forward data for future tax preparation and program specific communication between P+P and me.

Consent to Disclose: P+P may disclose my personal information to TaxSlayer (the tax preparation software) to e-file my tax return, and TaxSlayer may disclose my personal information to P+P for tax return follow-up.

Purpose: To allow P+P to transmit your tax return information electronically to TaxSlayer. TaxSlayer submits the return to the IRS and/or Minnesota Revenue. TaxSlayer transmits your information back to P+P with notice about the acceptance status of your tax return.

Consent to disclose personal tax information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. 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 to engage our tax return preparation services. 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.

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