



E. P. Tremblay and Associates, Inc.

Authorization for internal use of tax information

I hereby authorize E. P. Tremblay to use certain items of information on my last three years of tax returns for the purpose of

- Approval for annuities
- Approval for life insurance
- Approval for homeowner's insurance
- Approval for vehicle insurance
- Approval for mortgages
- Approval for _____

E.P. Tremblay's secondary use of information from these tax returns is solely for the purpose indicated above, and is limited to examination of the following line items found on form 1040, 1040a or 1040EZ: taxpayer and spouse names, tax identification numbers, mailing information, wages, salaries, tips etc., taxable interest, tax-exempt interest,, ordinary dividends, alimony received, business income or loss, capital gain or loss, IRA distributions, the taxable amount of IRA distributions, pensions and annuities, the taxable amount of pensions and annuities, rental real estate, royalties, partnerships, S corporations etc., farm income or loss, unemployment compensation, social security benefits and total income.

We generally are not authorized to use your tax return information for purposes other than the preparation and filing of your tax return. We may use your tax return information for other purposes only if you consent to each specific use. Your consent is valid for one year.

If you believe that your rights have been violated

If you have any questions or concerns about your rights regarding the use or disclosure of your tax return information, visit www.irs.gov/advocate for more information, or contact the Taxpayer Advocate Service of the Internal Revenue Service at 1-877-777-4778.

If you believe we have used or disclosed your information without your permission, you may contact the Treasury Inspector General for Tax Administration at 1-800-366-4484.

Client's signature _____

Client's name _____

Client's social security number _____

Client's date of birth _____