

Professional Desktop Software

Return Transfer Consent Form

Use this form for an individual Taxpayer who wants to transfer their Tax Return data to a new Tax Preparer at a different Company/Office for the sole purposes of preparing and e-filing their return.

This form provides Taxpayer consent to us or an affiliated company [depending on where the data is stored] to transfer a Taxpayer's tax return data to a new Tax Preparer.

Date: _____ (must have mm/dd/yyyy)

To: Technical Support

Email:

OR

Fax #: (281) 520-3841

Please release the tax return for:

Taxpayer Name

SSN

Spouse Name (if MFJ)

SSN

Taxpayer: By signing this form, you consent to have us, or an affiliated company transfer your Tax Return data from the office where you started your return to the Tax Preparer's office identified below for the purposes of finishing and e-filing the return. This consent is only valid for the purpose stated above. Without valid consent from the Taxpayer, this transfer request cannot be completed.

Tax Preparer: By signing this form, you acknowledge that you have verified the identity and signature of the Taxpayer who wants to transfer their return data from the company where they started their return to your tax preparation business. This consent form only allows you to use the Taxpayer data to prepare and e-file their return. Any other use of Taxpayer data will require an agreement or further consent from the Taxpayer.

This form will not be processed without valid signatures, copy of a government issued ID and a signed copy of the 8879 form.

Tax Preparer (ERO)

Taxpayer

Print Name

Print Name

Signature

Signature

User ID (ERO)

Spouse (if MFJ)

Print Name

Signature