

**Taxpayer Consent to Disclose Tax Return
Information Pursuant to Treas. Reg. § 301.7216-3(a)**

Internal Revenue Code § 7216 generally prohibits any person who is engaged in the business of preparing (or providing services in connection with the preparation of) U.S. income tax returns from disclosing information furnished to that individual for, or in connection with, the preparation of any such return. Treas. Reg. § 301.7216-3(a)(1) provides that such tax return information can be disclosed if written consent of the taxpayer is obtained.

This document is intended to provide the written consent to disclose tax return information to another tax professional to provide U.S. tax advice regarding your situation.

(A) Name of Tax Return Preparer/Tax Advisor: _____ (“we” / “us”).

Name of Taxpayer(s): _____ (“you”).

Statements required by Revenue Procedure 2008-35:

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 and, in certain limited circumstances, for purposes involving tax return preparation. 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. Because our ability to disclose your tax return information to another tax return preparer affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form. 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.

If this consent authorizes the disclosure of a copy of your entire tax return or all information contained within a return, you have the ability to request a more limited disclosure of tax return information as you may direct.

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.

(B) Intended purpose of the disclosure:

The purpose of the disclosure is to assist us in understanding your circumstances in order to provide advice to you. Your tax return information may be used to develop customized financial analysis reports and industry or peer comparisons to better serve you using the following hosted software applications:

Snapshot
Sageworks Counselor
Sageworks Industry Data and Analysis

Recipient of tax return information:

Sageworks, Inc. 5565 Centerview
Drive, Suite 201 Raleigh, North
Carolina 27606

(C) The tax return information to be disclosed includes (check all that apply):

U.S. tax returns for the years _____
 Financial statements for the years _____

(D) The tax return information will not be disclosed to any person located outside of the United States.

I/we, [Tax Payer's Name], hereby authorize and consent to the disclosure of my/our tax return information as described above.

[Taxpayer(s) signature] [Date]