



**CONSENT FORM**

Sparrow Wealth Management (“SWM”) needs your written permission to share your tax and financial information with your accountant/tax preparer (“Tax Preparer”). In order for your Tax Preparer to be able to send SWM your final tax returns, federal law requires this consent form be provided to you. Unless authorized by law, your Tax Preparer 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. If SWM or your Tax Preparer obtains your signature on this form by conditioning 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 your signature.

By your authorization below, you confirm that you have requested your Tax Preparer (as stated below) to disclose your tax return information to SWM so that we can better provide financial planning and investment advice to you. The information disclosed may include all information contained within, or derived from, your current or prior tax return(s), unless you request in writing a more limited disclosure.

**ACKNOWLEDGMENT**

I/We, \_\_\_\_\_, authorize \_\_\_\_\_, our Tax Preparer, to disclose to SWM my/our individual tax returns and information to assist with financial planning and investment advice. I/We also grant Sparrow Wealth Management my/our permission to discuss and share any relevant tax and financial information with our Tax Preparer, as stated above.

\_\_\_\_\_  
Client (and Spouse, if applicable) Signature(s)

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Tax Preparer’s Firm Name

December 31, 2030  
\_\_\_\_\_  
Duration of Consent

\_\_\_\_\_  
Tax Preparer’s Address

\_\_\_\_\_  
Tax Preparer’s Phone

\_\_\_\_\_  
Tax Preparer’s Email

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](mailto:complaints@tigta.treas.gov).