

# Consent to Disclosure of Taxpayer Data



By signing below, we hereby consent to the disclosure by the Waddell & Reed financial advisor identified below ("Advisor") of my taxpayer data that is in the possession of Advisor in connection with Advisor's outside business activity as an accounting and/or tax preparation professional.

1. The intended purpose of the disclosure is to allow Advisor to share such information with Waddell & Reed, Inc. in connection with Advisor's separate business activities as a financial advisor for Waddell & Reed, Inc.
2. The recipient of the information to be disclosed is Waddell & Reed, Inc. I hereby authorize the disclosure by Advisor of all information that I provided to, or that was generated by, Advisor in connection with the accounting and/or tax preparation services provided to me by Advisor, including, but not limited to, my personal identifying information and information and documents regarding my financial situation, income, assets, liabilities, expenses and tax deductions.
3. The names of the taxpayer(s) authorizing disclosure are \_\_\_\_\_ and \_\_\_\_\_.
4. The name of the tax return preparer authorized to disclose the above-referenced information is: \_\_\_\_\_ ("Advisor")

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. 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 we obtain your signature on this form by conditioning our 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.

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).

Taxpayer Signature(s):

\_\_\_\_\_  
Date: \_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_