



1125 Milwaukee Avenue, South Milwaukee WI 53172 - 414.764.7330

Consent for Use of Tax Return Information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. 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 signature.

DB Tax & Wealth and its tax preparers (the "Firm") request your consent to use your Tax Return Information which includes but may not be limited to, all communications with my Tax Preparer ("Preparer") and any information Preparer derives or generates from Tax Return Information in connection with my tax returns for the purpose of providing you with information about various tax planning strategies and financial services and products, which may include, but is not limited to: individual and business tax planning, estate and gift tax planning, business consulting, bookkeeping services, retirement planning, investment advice, investment products and services (e.g., stocks, bonds, mutual funds, insurance, and annuities) and long-term care and life insurance. Services are dependent upon the licenses held by your tax preparer. The Firm will distribute information in various ways including, but not limited to: newsletter, email, postal mail, website, phone, or other means of communication.

I understand that Preparer may use all of my Tax Return Information in connection with his/her affiliation with (a) Avantax Investment Servicessm; (b) Avantax Advisory Servicessm (AAS), a registered investment adviser; and/or (c) affiliates of those entities (collectively, "Avantax"), all of which are headquartered at 6333 N. State Highway 161, Fourth Floor, Irving, Texas 75038. Avantax does not offer, provide or supervise tax advice or tax preparation services, and any services provided by Avantax will be pursuant to a written agreement directly with the relevant Avantax entity.

I understand that DB Tax & Wealth is not a registered broker-dealer or a registered investment adviser.

I acknowledge that if I make an investment through Avantax that Preparer will receive a part of any management fees, commissions, or other fees paid on investments I make. I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Preparer.

Lisa Pugel & Mark Pugel are affiliated with Avantax Wealth Management and its affiliates (“Avantax”) as independent contractors solely for the purpose of providing clients with financial products and services.

☐ I/we consent to the use of my/our tax return information for this purpose.

☐ I/we do not consent to the use of my/our tax return information for this purpose.

The duration of this consent is three years from the date of signature, unless a more limited duration is specified here: I/we specify the duration of the above consent to be 3 years from the date of signature.

Taxpayer Printed Name

Signature

Date

Taxpayer Printed Name

Signature

Date

If the Firm also prepares tax returns for your *minor* children (under age 18), please print their names below. This consent also applies to their Tax Return Information.

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.