

EXPLANATION OF CONSENT FORMS

There are 4 consent forms regarding your tax data - why? - because the IRS requires your consent for each step we take with your data, such as the movement, collection, and use of your data. The following is a summary of each consent form, one of which is required for us to e-file your return. So please read carefully, otherwise you may have to paper-file your tax return.

CONSENT TO DISCLOSE (back of intake form)

Global Carry Forward of data allows TaxSlayer LLC, our tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. You are not required to complete this form to engage our tax return preparation services.

CONSENT TO DISCLOSE TAX RETURN INFORMATION TO THE VITA/TCE RELATIONAL OFFICE

Site will disclose personal information to the software developer through the software developer's tax preparation software. The software developer will disclose personal tax return information to the tax site's main office.

Purpose: For the software developer to make available the taxpayer's personal information to the tax site's relational office in order for them to provide support and administrative assistance to the tax preparer.

This consent form allows this site to share your entire tax return with our headquarters. **This is mandatory to e-file.** Why? Because this information is automatically shared in the e-filing process. If consent is not granted, the return cannot be e-filed. This also allows our main office to pull up your return to assist you after sites close on April 15th.

CONSENT TO USE PERSONAL TAX RETURN INFORMATION

Gateway EITC Community Coalition will retain aggregate data. No personally identifiable information, such as your name, Social Security number, address, or other personal information will be disclosed. It may contain a portion of the address (city, state, and/or zip code), and compiled information from the return such as the amount of refund, EITC, and other credits.

Purpose: To allow Gateway EITC Community Coalition to use data for statistical compilation and program analysis.

CONSENT TO DISCLOSE PERSONAL TAX RETURN INFORMATION

Disclosure: Gateway EITC Community Coalition will disclose a statistical summary to current and potential funders. No personally identifiable information, such as your name, Social Security number, address, or other personal information will be disclosed. It may contain a portion of the address (city, state, and/or zip code) and compiled information from the return such as the amount of refund, EITC, and other credits.

Purpose: To allow Gateway EITC Community Coalition to obtain new funding and prove program outcomes to current funders.

Needed for
funding