ROTH FINANCIAL GROUP
200 W Merritt Island Cswy
Merritt Island, FL 32952
321-454-3398

CONSENT FOR USE OF TAX RETURN INFORMATION

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

Duration of Consent (optional): _____

I hereby consent to the use of any and all tax return information contained in my federal income tax returns (Form 1040 series and supporting schedules) by Roth Financial Group for the purpose of reviewing for accuracy and to potentially assist with retirement planning services including investments, insurance, retirement, tax, and 401K rollovers.

Taxpayer Signature Date	Taxpayer Signature Date
Print Name	Print Name

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@treas.gov

Securities offered through Berthel Fisher & Company Financial Services, Inc. (BFCFS) Member FINRA/SIPC. Investment Advisory Services offered through BFC Planning, Inc. Roth Financial Group, BFCFS and BFC Planning, Inc. are independent entities. Tax services are offered through Roth Financial Group. Berthel Fisher & Company Financial Services, Inc. and BFC Planning Inc. do not offer tax or legal advice.

01/01/2019