



Schwartz
& Schwartz

Earned

8 Cedar Street, Suite 54, Woburn, MA 01801 Ph 800.471.0045 Fax 800.547.3366
www.schwartzaccountants.com

AUTHORIZATION TO RELEASE TAX INFORMATION

SECTION 1:

I _____ authorize _____
Please print name Accountant
and Schwartz & Schwartz, PC to release the following information:

SECTION 2:

Please indicate below which documents you would like sent. Please also provide for what purpose these documents are required and what you authorize the institution to use them for.

- ☐ Tax Returns - for the year(s) _____
- ☐ W-2s - for the year(s) _____
- ☐ Letter for Mortgage Company
- ☐ Other _____

Purpose of This Request _____

I authorize the recipient institution to use these documents for:

SECTION 3:

Please indicate the delivery method you would like for the documents (please note fees on page 2):

- ☐ Email
- ☐ Fax
- ☐ Mail/USPS First Class
- ☐ Mail/Overnight RUSH
- ☐ Client's Portal

Note: Client Portals are available for current clients to directly receive information from us. Portals can't be established for third parties nor can third parties be granted access to a Client Portal.



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SECTION 4:

Please send the information to:

Name of Institution _____

Attention _____

Street Address _____

City, State & Zip _____

Contact phone number _____

Contact fax number _____

Contact E-Mail Address _____

SECTION 5:

The fee schedule for this additional service is as follows:

- ☐ Mail copies of tax returns/W2s \$35
- ☐ RUSH: Overnight mail additional fee \$25 extra
- ☐ Email or Fax copies of tax returns/W2s \$15
- ☐ Portal delivery of tax returns/W2s No Charge (see note page 1)
- ☐ Prepare letter for mortgage company \$50
- ☐ RUSH: Letter for mortgage company \$95
with ONE DAY turnaround

PAYMENT: Payment must be received before your request is processed. Fees are payable by check or electronic payment.

SIGNATURE:

Signed _____

Date _____

Internal Use: Processed By _____ Date _____

Client Code to Bill _____