

## Retention of Information for Tax Year 2011 - Consent to Use Information -

SECU will provide both physical and electronic protection for the information until the information is properly destroyed. Information will be retained for seven years. The information retained will not be sold to, or shared with, any unauthorized persons or third party. Only authorized Credit Union employees will have access to your information.

With your consent, SECU will retain your information for the following uses:

- Generation of contact lists to provide notice of tax-return preparation and/or program-related activities or services by SECU that can benefit members.
- SECU utilizes a relational electronic filing identification number (EFIN) to provide certain support and administrative assistance to the tax preparer. The relational EFIN is also used to gather aggregate data for reporting purposes. SECU only reports aggregate data in our promotional material (e.g. *Grassroots* and the SECU website). No identifying taxpayer information is used in our reporting of totals. For example, our aggregate reporting includes information such as: "SECU completed 16,143 VITA returns in 2007."

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 of your tax return.

You are not required to grant consent. 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 specified above.

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).

CONSENT GRANTED

I/we, the Taxpayer, have read the above information and hereby consent to the use of personal information for the purpose stated above.

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

CONSENT DENIED

I/we, the Taxpayer, have read the above information and hereby DENY consent to the use of personal information for the purpose stated above.\*\*

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

**\*\*NOTE:** If this consent is denied, we will be unable to electronically file your return. However, we will be able to provide you with a paper return for you to mail to the IRS and NC Department of Revenue.

**Retention of Information for Tax Year 2011  
- Consent to Disclose -**

Information provided to tax preparers at this site will remain confidential. In addition, all information provided will be protected from unauthorized use. SECU will provide both physical and electronic protection for the information until the information is properly destroyed.

Information will be retained for seven years. The information retained will not be sold to, or shared with, any unauthorized persons or third party. Only authorized Credit Union employees will have access to your information.

The purpose of this form is to authorize SECU to disclose your information to select Credit Union employees for purposes other than completing your tax return. This includes retaining an image of your tax return for authorized access by you, the taxpayer, and approved Credit Union employees at a later time.

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 grant consent. 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 specified above.

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).

CONSENT GRANTED

I/we, the Taxpayer, have read the above information and hereby consent to the use of personal information for the purpose stated above.

Your Signature	Date	Spouse's Signature	Date
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CONSENT DENIED

I/we, the Taxpayer, have read the above information and hereby DENY consent to the use of personal information for the purpose stated above.

Your Signature	Date	Spouse's Signature	Date
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The IRS requires that certain documents be retained. If the above consent is denied, SECU will only image documents which are required to be maintained by the IRS.