



# Schwartz & Schwartz, P.C.

CPAs Specializing in Healthcare Professionals

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.*



# Schwartz & Schwartz, P.C.

CPAs Specializing in Healthcare Professionals

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

## **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 \$30
- 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 online via [Paypal](#)

## **SIGNATURE:**

Signed \_\_\_\_\_

Date \_\_\_\_\_

Internal Use: Processed By \_\_\_\_\_ Date \_\_\_\_\_

Client Code to Bill \_\_\_\_\_