

MY TAX SPOT LLC

IRC Section 7216 Compliance Notice

Important: use/disclosure consents must be separate and use current IRS-mandated language when required.

Why this document is separate

Internal Revenue Code Section 7216 generally restricts a tax return preparer from using or disclosing tax return information for unauthorized purposes. When a taxpayer consent is required, the consent must satisfy the applicable Treasury regulations and current IRS guidance.

Do not treat this notice as the actual Section 7216 consent

The IRS requires specific mandatory language for certain Section 7216 consents. My Tax Spot LLC should use a current, separately presented consent prepared from the current IRS requirements for the exact proposed use or disclosure. Do not bundle that consent into the general engagement agreement.

Recommended DocuSign workflow

- Create a separate envelope document for each required use or disclosure consent.
- State the specific recipient or purpose and the tax return information involved.
- Use the current mandatory IRS language and formatting requirements.
- Capture affirmative consent, date/time, signer identity, and audit trail.
- Retain the executed consent according to applicable recordkeeping requirements.

This notice is designed to prevent accidental use of a generic consent where a Section 7216-specific consent is required. Have your final Section 7216 forms reviewed for your actual services and disclosures.