



PYRAMID FINANCIAL SERVICES

Tax Return Distribution Form ...Per IRS regulations (Circular 230), this form must be completed prior to the distribution of any sensitive client information and/ or tax return.

I have asked Pyramid Financial Services to:

- Fax
- Email
- Other _____

A copy of my (list all years) _____ income tax return(s) and/ or other information to:

- Name of recipient _____
- Title _____
- Company _____
- Fax number or email address _____

Please understand that faxing or emailing is not a secure way to deliver sensitive data. Pyramid Financial Services shall be held harmless to any information that may be intercepted and/or stolen during this transmission. Also, there will be a convenience fee of \$5.00 for all fax, email, and other transmissions. This fee must be taken prior to submission and can be paid via cash, check, or credit/ debit card via our online portal.

Taxpayer Signature

Date

Spouse's Signature

Date

For office use only:

Completed by: _____ Date completed _____

Years submitted _____ # of pages submitted _____