LEXINGTON FINANCIAL
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CLIENT SOLICITATION AND USE CONSENT

General Consent

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 and filing of your tax return.

You are not required to complete this form. 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 that you specify. If you do not specify the duration of your consent, your consent is valid for two years.

You understand that no tax return information will be disclosed to any person or for any purpose unless specifically authorized by you or as otherwise allowed by Federal law. You understand that you are under no obligation to follow any future tax planning or financial recommendations made to you, or to purchase any products or services offered to you by your Tax Preparer or through any third party.

By signing this consent, you are authorizing your Tax Preparer to use your tax return information for the purpose of soliciting or providing to you the following products and other services not related to tax preparation:

- ☐ Tax planning, consultation, or other tax-related questions, whether or not incidental to the preparation of your tax returns
- ☐ Tax representation services, including IRS or state tax examinations or tax collections matters
- ☐ Periodic e-mails or newsletters from Lexington Financial, whether for tax planning or non-tax related services (unless you have requested not to receive these)
- ☐ General investment advice
- ☐ Equity or fixed income securities, or mutual funds
- ☐ Life insurance products, and variable and fixed annuity products
- ☐ Other insurance products, including disability and long-term care
- ☐ Any other miscellaneous service that you may later request (including, but not limited to, referral to other professional colleagues)
- ☒ **All of the above products and services**

You consent to the use of **any and all information** from **any tax returns that we may prepare** for you (and your spouse, for joint filers). You consent to the use of **any and all information** from **any tax returns we may prepare for other entities you represent as a fiduciary or other responsible signing agent, as indicated below.** You consent to the use of **all returns prepared while your consent remains valid,** as indicated below.

☒ My consent is valid through April 15, **2025**.

☐ My consent is valid through April 15, ____________ (enter a year after 2025).

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*.

Tax Preparer: Marciel Camacho, EA, CFP®

Taxpayer Name (Print): ____________________ Entity Name (If applicable): _______________

Taxpayer Signature: ___________________ Date: __________

Marciel J. Camacho is an Enrolled Agent/ CERTIFIED FINANCIAL PLANNER™ practicing at 1475 South Bascom Avenue Suite 201, Campbell, CA 95008. He offers securities and advisory services as an investment adviser representative of Commonwealth Financial Network®, a member firm of FINRA/SIPC and a Registered Investment Adviser. He can be reached at (408) 395-5000 or at marciel@lexington-finance.com.