

## CONSENT TO DISCLOSE FINANCIAL DATA TO THIRD PARTIES

**1. Role of Carry:** The Vibes Company Inc. and Carry Tax LLC (collectively "Carry") provide a technology platform to help organize your tax strategies. **Carry is not a CPA firm and does not prepare tax returns.** However, if Carry is considered a tax return preparer under federal law, we require your consent to share your data with the professionals who will actually prepare your return and to our affiliates for financial planning.

### 2. Federal Disclosure Warning

If Carry is considered a tax return preparer, Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. 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 consent to this form. Because our ability to disclose your tax return information to a tax return preparer affects the tax return preparation service(s) that you may purchase, we may decline to refer you to tax return preparation services if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for one year from the date of signature unless you otherwise specify.

This consent to disclose may result in your tax return information being disclosed to a tax return preparer located outside the United States, including your personally identifiable information such as your Social Security Number ("SSN"). In this case, both the tax return preparer in the United States that will disclose your SSN and the tax return preparer located outside the United States that will receive your SSN maintain an adequate data protection safeguard (as required by the regulations under 26 U.S.C. Section 7216) to protect privacy and prevent unauthorized access of tax return information. If you consent to the disclosure of your tax return information, Federal agencies may not be able to enforce US laws that protect the privacy of your tax return information against a tax return preparer located outside of the US to which the information is disclosed.

### 3. What You Are Agreeing To:

By clicking "I AGREE" on the check out page, you authorize Carry to disclose, without limitation, all information you provide for the purpose of providing you the services you have elected (including all your financial data, documents, and communications generated related from such services):

- **Tax Partners** (e.g., April Tax Solutions Inc., Online Taxman LLC) for the purpose of preparing your tax return and providing tax planning.
- **The Vibes Company and Carry Affiliates** (The Vibes Company, Carry Advisors LLC,

Global Carry LLC) for the purpose of analyzing your tax situation to offer you relevant financial products (e.g., Solo 401k, IRAs, bookkeeping) and other related investment strategies.

**4. Terms:**

- You are not required to complete this form to engage our tax services.
- If you do not consent, you may be unable to use the integrated Carry features or technology that require data sharing between your tax return and investment accounts.
- This consent is valid for one (1) year from today.

If you believe your tax return information has been disclosed or used improperly, you may contact the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484 or [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).