

Tax Information Authorization

▶ Go to www.irs.gov/Form8821 for instructions and the latest information.
 ▶ Don't sign this form unless all applicable lines have been completed.
 ▶ Don't use Form 8821 to request copies of your tax returns or to authorize someone to represent you. See instructions.

OMB No. 1545-1165
For IRS Use Only
Received by: _____
Name _____
Telephone _____
Function _____
Date _____

1 Taxpayer information. Taxpayer must sign and date this form on line 6.

Taxpayer name and address	Taxpayer identification number(s)
Daytime telephone number	Plan number (if applicable)

2 Designee(s). If you wish to name more than two designees, attach a list to this form. **Check here if a list of additional designees is attached** ▶

Name and address James McGowan 25 Broad Street, Floor 2 Red Bank, NJ 07701	CAF No. _____ 0315-23889 PTIN _____ P02537601 Telephone No. _____ 732-691-4928 Fax No. _____ 631-675-1704
Check if to be sent copies of notices and communications <input type="checkbox"/>	Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

Name and address Elizabeth Boonin 95 Smithtown Blvd Smithtown, NY 11787	CAF No. _____ 0310-03870 PTIN _____ P01627702 Telephone No. _____ 732-691-4998 Fax No. _____ 631-675-1704
Check if to be sent copies of notices and communications <input type="checkbox"/>	Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

3 Tax information. Each designee is authorized to inspect and/or receive confidential tax information for the type of tax, forms, periods, and specific matters you list below. See the line 3 instructions.

By checking here, I authorize access to my IRS records via an Intermediate Service Provider.

(a) Type of Tax Information (Income, Employment, Payroll, Excise, Estate, Gift, Civil Penalty, Sec. 4980H Payments, etc.)	(b) Tax Form Number (1040, 941, 720, etc.)	(c) Year(s) or Period(s)	(d) Specific Tax Matters
INCOME	1040	2020 - 2023	NOT APPLICABLE
INCOME	1040	2024 - 2026	NOT APPLICABLE

4 Specific use not recorded on the Centralized Authorization File (CAF). If the tax information authorization is for a specific use not recorded on CAF, check this box. See the instructions. If you check this box, skip line 5 ▶

5 Retention/revocation of prior tax information authorizations. If the line 4 box is checked, skip this line. If the line 4 box isn't checked, the IRS will automatically revoke all prior tax information authorizations on file unless you check the line 5 box and **attach a copy** of the tax information authorization(s) that you want to retain ▶
 To revoke a prior tax information authorization(s) without submitting a new authorization, see the line 5 instructions.

6 Taxpayer signature. If signed by a corporate officer, partner, guardian, partnership representative (or designated individual, if applicable), executor, receiver, administrator, trustee, or individual other than the taxpayer, I certify that I have the legal authority to execute this form with respect to the tax matters and tax periods shown on line 3 above.

▶ IF NOT COMPLETED, SIGNED, AND DATED, THIS TAX INFORMATION AUTHORIZATION WILL BE RETURNED.

▶ DON'T SIGN THIS FORM IF IT IS BLANK OR INCOMPLETE.

Signature	Date
Print Name	Title (if applicable)

HALCYON CONSENT & DISCLOSURE FORM

Purposes for using and disclosing information: For use by Nations Direct Mortgage, LLC and tax transcript service provider, Halcyon Still Water LLC, to retrieve and analyze information as requested by the sponsoring financial institution(s) named below to facilitate loan processing, including, but not limited to, transmitting the information to Freddie Mac, Fannie Mae, as well as any approved use related to this loan as outlined in the Gramm-Leach-Bliley Act. This includes determining relevant financial offers and opportunities, and approvals. In no case shall this data be used and disclosed in anyway inconsistent with this agreement.

Halcyon Still Water, LLC is required by the IRS to provide the individual names of authorized tax professionals working for the company. On the 8821 form you will see **James McGowan** and **Elizabeth Boonin** identified; these are officers of Halcyon Still Water, LLC individually authorized by, and registered with, the IRS for the purpose outlined above.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use or disclose your personal financial information, including tax transcript data, to third parties for purposes other than those directly related to the services provided without your consent. If you consent to the use and disclosure of your personal financial information, federal law may not protect your information from further use or distribution.

Information used and disclosed: "Personal financial information" includes any data element obtained throughout the tax data retrieval process or other financial services, including but not limited to, IRS tax transcript data and source documents, information derived from tax transcript elements, or other information provided related to your financial situation.

Name, and address of recipient:

NATIONS DIRECT MORTGAGE, LLC
2475 VILLAGE VIEW DR SUITE 100, HENDERSON, NV 89074

The duration of this consent will remain in effect in perpetuity. If you approve the use and disclosure of your IRS tax data and tax transcript information to Nations Direct Mortgage, LLC, please sign below.

Borrower Name: _____

Signature: _____

Date: _____

Co-Borrower Name: _____

Signature: _____

Date: _____