



## Georgia Department of Revenue Disclosure Authorization Form

Submit this form to the Department employee handling your inquiry.

### Section 1 Taxpayer Information

Taxpayer Name	SSN/FEIN	Telephone Number
Spouse's Name (if joint income tax return)	Spouse's SSN (if applicable)	Telephone Number (if applicable)
Mailing Address		
Spouse's Mailing Address (if different from above)		

### Section 2 Appointee Information

Name of Appointee	Telephone Number	Email Address
Mailing Address		

### Section 3 Tax Matters

The appointee is authorized to receive confidential information for the tax matter(s) listed below:

Tax Type	Tax Year(s) or Period(s)
Individual Income Tax	
Sales and Use Tax	
Corporate Income Tax	
Withholding Tax	
Other (specify)	

### Section 4 Signature of Taxpayer

I hereby certify that the Georgia Department of Revenue is authorized to disclose and/or discuss confidential information or records concerning the undersigned taxpayer to the appointee named above for the tax type(s) and period(s) listed above. If signed by a corporate officer, partner, member, trustee, or executor/executrix on behalf of the taxpayer, I certify that I have the authority to execute this form on behalf of the taxpayer. I understand that to willfully prepare or present a document that is fraudulent or false is a felony under O.C.G.A. § 16-10-20.

Signature	Print Name	Date	Title (if corporate officer)
Spouse's Signature	Print Spouse's Name	Date	

**Acknowledgement of Disclosure Authorization.** The person(s) signing as the taxpayer above appeared this day before a notary public and acknowledged this Disclosure Authorization Form as a voluntary act and deed.

Sworn and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Signature of Notary	Notary Seal
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### Section 5 Expiration Upon Disclosure (For Internal Department Use Only)

This disclosure authorization form will automatically expire once the Department has disclosed all applicable information to the appointee.

Employee Making Disclosure:	Date of Disclosure:
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## Form RD-1062 Disclosure Authorization Form

### Purpose of Form

A taxpayer may use Form RD-1062 to authorize the Georgia Department of Revenue to disclose confidential tax information to an appointee for a specific tax type(s) and period(s). Form RD-1062 cannot be used as a Power of Attorney (see Form RD-1061) and thus does not grant the appointee any powers of representation. Taxpayers should only use this form when submitting a specific request for a one-time disclosure of information.

### Filing Instructions

Submit Form RD-1062 to the Department employee handling your inquiry.

### Specific Instructions

#### **Section 1 – Taxpayer Information**

Enter the name, address, and any applicable identification numbers of the taxpayer. If the taxpayer is an individual, enter the full Social Security number (SSN). If the taxpayer is a business entity, enter the Federal Employer Identification Number (FEIN). If the taxpayer is granting access to a joint return, enter the spouse's name, address, and full SSN.

#### **Section 2 – Appointee Information**

Enter the appointee's name, address, and contact information. An appointee must be an individual, not a business entity. If designating authority to more than one appointee, file an additional Form RD-1062.

#### **Section 3 – Tax Matters**

Enter the tax type(s) and specific period(s) or year(s) for which the authorization is granted. A general reference to "all years" or "all periods" or future dates is not acceptable.

#### **Section 4 – Signature of Taxpayer**

The taxpayer must sign in Section 4 for Form RD-1062 to be effective. The table below shows who should sign for each type of taxpayer:

<b>Taxpayer</b>	<b>Who Must Sign</b>
Individuals	The individual/sole proprietor must sign (if granting access to a joint return, spouse must also sign).
Corporations	A corporate officer with authority to sign.
Partnerships	A partner having authority to act in the name of the partnership must sign.
Limited Liability Companies	A member having authority to act in the name of the company must sign.
Trusts	A trustee must sign.
Estates	An executor/executrix of the personal representative of the estate must sign.

This Form RD-1062 must be notarized unless it is being presented by a federal agent who is verified by the Department.

#### **Section 5 – Expiration Upon Disclosure**

A Form RD-1062 may only be used for a one-time disclosure of certain tax information. Thus, Form RD-1062 will expire upon disclosure to the appointee. For any subsequent disclosures, a new Form RD-1062 must be filed.

It is important to note that the filing of a Form RD-1062 disclosure authorization **will not** revoke any Power of Attorney (Form RD-1061) or Reporting Agent Authorization (Form RD-1063) that is in effect.