

1177

(Rev. June 2024)

HALCYON CONSENT FORM

Tax Information Authorization Form-8821 cannot be processed without a signed **Halcyon Consent Form-1177**.

Purpose: For use by _____ and tax transcript service provider, Halcyon Still Water LLC and its affiliates, ("Halcyon") to retrieve and analyze Your Financial Information as requested by the sponsoring financial institution(s) named below to facilitate your loan processing, including, but not limited to, transmitting such information to third party loan purchasers or quality control servicers, as well as any approved use provided for in the Gramm-Leach-Bliley Act (the "Services"). This includes transmitting such information to Freddie Mac, Fannie Mae as well as determining relevant financial offers, opportunities and approvals.

Halcyon: is a tax preparer and a 3rd party provider licensed with the IRS to retrieve your tax information based on a duly authorized IRS Form 8821. Halcyon is required by the IRS to provide you with the individual names of authorized tax professionals working for the company. On Form 8821 you will see **James McGowan** and **Elizabeth Boonin** identified; these are officers of Halcyon individually authorized by and registered with the IRS.

Federal law: requires this consent form be provided to you. Unless authorized by law, we cannot use or disclose your personal financial information, including your tax transcript data (collectively, "Your Financial Information"), 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 Financial Information, federal law may not prevent Your Financial Information from further use or distribution.

Information used: "Your 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. In no case shall your financial information be used in any way inconsistent with this consent

Unauthorized Use: If you believe Your Financial 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.

Name, and address of Sponsoring Financial Institution:

This consent will remain in effect during the term of your loan for a period of 180-days from the execution date below. If you consent to the use of Your Financial Information *as provided for above*, please sign below.

Name:

Signature:

Date: