



Members of National Association of Enrolled Agents

H & R PYE'S

Tax & Accounting Service

46 Varney Mill Road
Bath, ME 04530
(207) 443-6183 * Fax (207) 443-8970
www.pyestax.com

Holly D.G. Pye, CMA, EA
Email: hollypye@pyestax.com

Ronald A. Pye, EA
1941-2014

DISCLOSURE AUTHORIZATION AND CUSTOMER AGREEMENT

I am aware that Holly D.G. Pye is in the business of providing financial and investment services beyond tax return preparation and tax representation, and that my tax information can be used to make recommendations to me, including, but not limited to, the following:

- Comprehensive Financial Services
- General Investment Planning
- Advice, Planning and Sales related to Tax-Advantaged Investment Vehicles
- Advice, Planning and Sales related to Tax-Advantaged Retirement Plans
- Sales of Securities, including Mutual Funds

I am aware that the law requires a high level of privacy in the handling of my tax and financial affairs. I am aware that federal law prohibits H & R Pye's Tax and Accounting Services disclosure of tax returns and return information and also prohibits the use of any tax return information I provide for any purpose other than the preparation of the tax return(s) for which such information was provided. If they prepare my individual tax return, additional disclosure is required in accordance with IRS Code §7216.

I understand that Holly D.G. Pye is a Registered Representative of H.D. Vest Investment ServicesSM (member FINRA), headquarters at 6333 North State Highway 161, Fourth Floor, Irving Texas 75038, (972)-870-6000.

As an H.D. Vest Representative, Holly D.G. Pye will receive cash commissions for the sale of investment securities and financial products. The amount of the total commission paid to H.D. Vest is shown in the prospectus of each security sold.

I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Holly D.G. Pye.

I understand that beyond the specific purpose of providing other financial advice or proposing other services to me, no tax return information will be disclosed to any person or for any purpose not specifically allowed by law or by subsequent written approval by me.

Taxpayer Name

Taxpayer Signature

Date

Spouse Name:

Spouse Signature

Date

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 to: complaints@tigta.treas.gov

*Securities offered through H.D. Vest Investment ServicesSM, Member: SIPC, Advisory services offered through H. D. Vest Advisory ServicesSM
6333 North State Hwy. 161, Fourth Floor, Irving, Texas 75038 (972) 870-6000
H & R Pye's Tax and Accounting Service is not a registered broker/dealer or independent investment advisory firm