

Client Consent

In 4 easy steps, known clients can grant permission allowing their advisor to request IRS-sourced financial data in less than 30 seconds.

You are in control of your data. TaxStatus can only access and provide records to your advisor with your consent and IRS approval.

When you open your advisor's consent link, you'll land on a welcome page and be asked to complete knowledge-based authentication (KBA), a security step that confirms your identity by asking you a few personal questions. To finish, simply type your name and the date to agree to the terms.

This one-time consent stays valid for three years, allowing your advisor to monitor your IRS account and financial data in real time. You can revoke it at any time through the TaxStatus Privacy Center.

