

**2007 DRAFTING REQUEST**

**Bill**

Received: 02/19/2007

Received By: mkunkel

Wanted: As time permits

Identical to LRB:

For: Jim Sullivan (608) 266-2512

By/Representing: Kyle

This file may be shown to any legislator: NO

Drafter: mkunkel

May Contact:

Addl. Drafters:

Subject: Trade Regulation - other

Extra Copies: CTS

Submit via email: YES

Requester's email: Sen.Sullivan@legis.wisconsin.gov

Carbon copy (CC:) to:

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**Pre Topic:**

No specific pre topic given

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**Topic:**

Require tax preparers to obtain consent for release of client information

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**Instructions:**

Prepare companion to LRB-1674

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**Drafting History:**

<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
/?	mkunkel 02/19/2007	jdye 02/19/2007		_____			State
/1			pgreensl 02/19/2007	_____	sbasford 02/19/2007	cduerst 02/19/2007	

FE Sent For: //1" @ intro.  
2-26-2007

<END>

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/?	mkunkel	1 2/19 jld	2/19 P8	2/19 P8			

FE Sent For:

<END>

- 2008/1

RMNIT  
RUN

Tues  
2-20  
PM

P-NOTE

**2007 BILL**

Regen

1 AN ACT *to create* 100.55 of the statutes; **relating to:** information obtained by  
2 a tax preparer in the course of preparing a client's tax return.

***Analysis by the Legislative Reference Bureau***

This bill prohibits a tax preparer or an entity that employs tax preparers from disclosing information obtained in the course of preparing a client's tax return, unless the tax preparer or entity discloses the parties to whom the tax preparer or entity intends to disclose the information, and the client consents in writing. The Department of Agriculture, Trade and Consumer Protection enforces the prohibition.

For further information see the **state** fiscal estimate, which will be printed as an appendix to this bill.

***The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:***

3 SECTION 1. 100.55 of the statutes is created to read:  
4 **100.55 Tax preparers; privacy of client information. (1)** In this section:  
5 (a) "Client" means a person whose tax return is prepared by a tax preparer.  
6 (b) "Tax preparer" means a person who, in exchange for compensation or  
7 expectation of compensation, prepares a tax return of another person.



**DRAFTER'S NOTE**  
**FROM THE**  
**LEGISLATIVE REFERENCE BUREAU**

LRB-2008/1dn

MDK:.....

date

↑  
jld

Sen. Sullivan:

This is a companion bill to LRB-1674/1. ✓

Mark D. Kunkel  
Senior Legislative Attorney  
Phone: (608) 266-0131  
E-mail: [mark.kunkel@legis.wisconsin.gov](mailto:mark.kunkel@legis.wisconsin.gov)

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FROM THE  
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LRB-2008/1dn  
MDK:jld:pg

February 19, 2007

Sen. Sullivan:

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Mark D. Kunkel  
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Phone: (608) 266-0131  
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**Duerst, Christina**

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**From:** Swentkofske, Matthew  
**Sent:** Monday, February 19, 2007 3:59 PM  
**To:** LRB.Legal  
**Subject:** Draft Review: LRB 07-2008/1 Topic: Require tax preparers to obtain consent for release of client information

Please Jacket LRB 07-2008/1 for the SENATE.