

Your tax return is secret by law. TurboTax wants you to give up your privacy.

Tax preparers can only use your return information to file your taxes, unless you agree otherwise



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“We just need your OK on a couple of things,” TurboTax says as you prepare your tax return.

Alarm bells should be ringing in your head at the innocuous tone.

This is where America’s most popular tax-prep website asks you to sign away the ironclad privacy protections of your tax return, including the details of your income, home mortgage and student loan payments.

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Tech Friend writer Shira Ovide gives you advice and context to make technology work for you. [Sign up for the free Tech Friend newsletter.](#)

(Patrick Dias for The Washington Post)

With your permission to blab your money secrets, the company earns extra income from showing you advertisements for the next three years for things like credit cards and mortgage offers targeted to your financial situation.

You have the legal right to say no when TurboTax asks for your permission to “share your data” or use your tax information to “improve your experience.” I’ll walk you through how to decline.

This is part of the [corporate arms race for your personal data](#). Everyone including the [grocery store](#), [your apps](#) and the [manufacturer of your car](#) are gobbling information to profit from details of your life. With TurboTax, though, you have the power to refuse to participate.

TurboTax says you might like financial ads tailored to your personal needs. It’s essentially a trade. That means you should get something you believe is worth the cost of sharing your tax return secrets.

But the company uses vague language about the terms of the deal. Maybe that shows TurboTax doesn't think this is a fair trade for you.

A spokesman for Intuit, which owns TurboTax, said that people using the tax software have a "clear and transparent explanation" and that "nothing is hidden" when the company asks for permission to use your data for purposes other than filing your tax return.

They're asking for WHAT?

By law and unless you say otherwise, TurboTax and other tax preparers can *only* use the financial information you provide to help you prep and file your tax return. That's what you pay them for.

But TurboTax also wants your consent to disclose details from your tax return for other purposes.

For example, your income and debts might be used to personalize email pitches for a high-interest savings account or credit monitoring help from Credit Karma. (TurboTax and Credit Karma are both owned by Intuit.)

And with your permission, TurboTax will tell its Intuit sibling companies about other details such as your salary, the amount of your tax refund, whether you received a tax break for student loans and the day you printed your tax return.

Ask yourself if you believe Intuit will give you trustworthy financial advice and offers — and whether the company needs to use private details of your salary and retirement savings to advertise products to you.

The Intuit spokesman said the company "shares only the data necessary for the customer to be able to take advantage of the product or service they choose and only with approved third parties."

The moment of truth

TurboTax and the online tax prep service from H&R Block have been asking every year to blab your tax return. We've cautioned you about it for each of the past two tax filing seasons. (I focused only on TurboTax this year.)

I went through the process of prepping my own tax return with TurboTax. Even I found it a little confusing to understand what TurboTax was asking for permission to do with my data.

When you see the screen — "We just need your OK on a couple of things" — it's time to be vigilant.

You'll see that permission request once near the beginning of the tax prep process. If you skip it then, you'll see the same screen again near the end. You'll have to say yes or no to use information from your tax return for something other than filing your tax return.

Read carefully what TurboTax is asking.

If you read the FAQ documents, TurboTax is clear that your permission is voluntary to use your tax return information to sell you more financial products down the line. I don't know how many people will bother to dig into the details.

If you refuse, TurboTax will still complete your tax return.

When I was asked to "Review and Sign," I filled in my name and the date and clicked "No thanks." Twice.

Read More:

- Here are the tax deadlines for 2024 and new wrinkles for this tax filing season
- What you can do if you can't pay your tax bill on time
- *Have you tested the new IRS Direct File site? The Post wants to hear from you.*