TAX RECORDS PRIVACY AND NON-DISCLOSURE AGREEMENT

This Tax Records Privacy and Non-Disclosure Agreement (the "Agreement") is entered into as of _____, by and between:

Disclosing Party: _____

Receiving Party: _____

Collectively referred to herein as the "Parties."

1. PURPOSE

The Disclosing Party intends to share highly sensitive personal and financial tax information with the Receiving Party for the sole purpose of _____. The Receiving Party agrees to receive and handle this information in strict confidence under the terms and conditions set forth below.

2. DEFINITION OF CONFIDENTIAL INFORMATION

For purposes of this Agreement, "Confidential Information" shall include all tax-related documents, records, and information disclosed by the Disclosing Party, including but not limited to:

a. Federal, state, and local tax returns (Forms 1040, 1120, 1065, etc.) and all accompanying schedules, attachments, and worksheets.

b. W-2, 1099, K-1, and other tax reporting forms.

c. Financial statements, bank statements, bookkeeping records, ledger balances, and transaction histories.

d. Social Security Numbers, Employer Identification Numbers, bank account numbers, and other personally identifiable information (PII).

e. Any other financial notes, projections, analyses, or compilations prepared from the aforementioned documents.

3. OBLIGATIONS OF RECEIVING PARTY

The Receiving Party shall:

a. Hold all Confidential Information in the strictest confidence and take all reasonable precautions to prevent unauthorized access, disclosure, copying, or distribution.

b. Use the Confidential Information solely for the purpose specified in Section 1, and for no other commercial or personal purpose.

c. Restrict access to the Confidential Information to only those employees, agents, or professional advisors who have a legitimate "need to know" and who are bound by confidentiality obligations no less restrictive than those herein.

d. Store physical and digital copies of the Confidential Information in a secure environment utilizing industry-standard encryption and physical security measures.

4. PERMITTED DISCLOSURES

The Receiving Party may only disclose Confidential Information if required to do so by applicable law, regulation, or court order. Prior to making any such legally compelled disclosure, the Receiving Party shall, to the extent legally permissible, provide the Disclosing Party with prompt written notice so that the Disclosing Party may seek a protective order or other appropriate remedy.

5. TERM AND TERMINATION

This Agreement shall govern all communications between the Parties. The obligations of confidentiality shall survive the termination of this Agreement and shall remain in effect indefinitely, or until such time as the Confidential Information enters the public domain through no fault of the Receiving Party.

6. RETURN OR DESTRUCTION OF RECORDS

Upon written request by the Disclosing Party, or immediately upon completion of the purpose described in Section 1, the Receiving Party shall securely return or destroy all physical and digital copies of the Confidential Information, and certify such destruction in writing to the Disclosing Party.

7. REMEDIES

The Receiving Party acknowledges that any breach of this Agreement may cause irreparable harm to the Disclosing Party for which monetary damages would be inadequate. Accordingly, the Disclosing Party shall be entitled to seek injunctive relief to prevent breaches of this Agreement, in addition to any other remedies available at law or in equity.

8. GOVERNING LAW

This Agreement shall be governed by, and construed in accordance with, the laws of the State of _____, without regard to its conflict of law principles.

IN WITNESS WHEREOF, the Parties have executed this Tax Records Privacy and Non-Disclosure Agreement as of the date first written above.

DISCLOSING PARTY:	**RECEIVING PARTY:**
_____	_____
Signature	Signature
_____	_____
Printed Name	Printed Name
_____	_____
Title (if applicable)	Title (if applicable)
_____	_____
Date	Date