CLIENT TAX RETURN INFORMATION CONFIDENTIALITY AGREEMENT

This Confidentiality Agreement (the "Agreement") is entered into as of this_____ day of _____, 20____, by and between:

Disclosing Party (Client): _____

Receiving Party (Tax Preparer/Firm): _____

Collectively referred to herein as the "Parties."

1. Purpose. The Disclosing Party wishes to provide the Receiving Party with certain financial and personal records for the sole purpose of preparing, reviewing, and filing the Disclosing Party's federal, state, and/or local tax returns.

2. Definition of Confidential Information. "Confidential Information" shall include all tax returns, schedules, financial statements, W-2s, 1099s, bank statements, social security numbers, taxpayer identification numbers, and any other oral or written financial and personal information disclosed by the Disclosing Party to the Receiving Party for the preparation of tax returns.

3. Protection of Confidential Information. The Receiving Party agrees to:

a. Maintain the absolute confidentiality of all Confidential Information received from the Disclosing Party.

b. Limit access to the Confidential Information solely to employees, contractors, or agents who directly require access to perform the tax services and who are bound by similar confidentiality obligations.

c. Not disclose, copy, or distribute any Confidential Information to any third party without the express prior written consent of the Disclosing Party, except as required by law or judicial process.

d. Implement and maintain appropriate administrative, technical, and physical safeguards to secure the Confidential Information from unauthorized access, loss, or disclosure.

4. Compliance with Laws. The Receiving Party agrees to comply with all applicable privacy laws and regulations, including but not limited to Section 7216 of the Internal Revenue Code (IRC), regarding the unauthorized disclosure or use of information by preparers of returns.

5. Return or Destruction. Upon written request by the Disclosing Party, or upon completion of the services, the Receiving Party shall return all original documents provided by the Disclosing Party and securely destroy any unauthorized electronic copies, subject to professional record retention policies required by law.

6. Term. The obligations of confidentiality under this Agreement shall survive the termination of the professional relationship and remain in effect indefinitely or until such time as the Confidential Information enters the public domain through no fault of the Receiving Party.

7. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of _____.

IN WITNESS WHEREOF, the Parties have executed this Client Tax Return Information Confidentiality Agreement as of the date first written above.

DISCLOSING PARTY (CLIENT):

_____

Signature

_____

Printed Name

_____

Date

RECEIVING PARTY (PREPARER/FIRM):

_____

Signature

_____

Printed Name / Title

_____

Date