CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

(Tax Return Services)

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

Disclosing Party: _____

Receiving Party: _____

1. PURPOSE

The Disclosing Party has engaged or may engage the Receiving Party to perform tax preparation, planning, and related financial consultation services. In connection with these services, the Disclosing Party will provide the Receiving Party with proprietary, personal, and sensitive financial information.

2. DEFINITION OF CONFIDENTIAL INFORMATION

For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value, personal privacy value, or other utility in the business or personal affairs in which Disclosing Party is engaged. Confidential Information includes, but is not limited to: federal, state, and local tax returns, schedules, W-2 and 1099 forms, bank statements, brokerage statements, bookkeeping records, financial statements, Social Security numbers, taxpayer identification numbers, and any other financial or personal data provided by the Disclosing Party.

3. OBLIGATIONS OF RECEIVING PARTY

The Receiving Party shall:

- Hold and maintain the Confidential Information in the strictest confidence.
- Use the Confidential Information solely for the purpose of preparing tax returns and providing related financial services.
- Restrict access to Confidential Information to only those employees, contractors, or agents who need to know such information to perform the services and who are bound by confidentiality obligations at least as restrictive as those contained herein.
- Implement and maintain reasonable physical, administrative, and technical safeguards to protect the security and integrity of the Confidential Information.

4. PERMITTED DISCLOSURES

The Receiving Party may disclose Confidential Information only when:

- Expressly authorized in writing by the Disclosing Party.
- Required by law, regulation, or a valid subpoena, provided that the Receiving Party gives the Disclosing Party prompt written notice of such requirement (to the extent legally permissible) to allow the Disclosing Party to seek a protective order.

5. TERM AND RETURN OF INFORMATION

The non-disclosure provisions of this Agreement shall survive the termination of this Agreement and the completion of the tax services. Upon written request by the Disclosing Party, the Receiving Party shall return or securely destroy all copies of the Confidential Information, except as required by law, professional standards, or established document retention policies.

6. GOVERNING LAW

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

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first written above.

Disclosing Party:

_____

Signature

Print Name: _____

Date: _____

Receiving Party:

_____

Signature

Print Name: _____

Date: _____