

TAXPAYER PRIVACY AND DATA PROTECTION AGREEMENT

This Taxpayer Privacy and Data Protection Agreement (the "Agreement") is entered into and made effective as of _____, 20____ (the "Effective Date"), by and between:

Disclosing Party / Taxpayer: _____, residing at/having its principal place of business at

(hereinafter referred to as the "Taxpayer"), and

Receiving Party / Representative: _____, residing at/having its principal place of business at

(hereinafter referred to as the "Recipient").

The Taxpayer and the Recipient may collectively be referred to as the "Parties" or individually as a "Party."

1. PURPOSE

The Recipient performs certain tax preparation, consulting, financial representation, or related services for the Taxpayer. In connection with these services, the Recipient will have access to, receive, or process personal, financial, and tax-related information. The purpose of this Agreement is to ensure the absolute confidentiality, privacy, and security of all such Taxpayer Information in compliance with applicable federal, state, and international data protection laws regulations.

2. DEFINITION OF TAXPAYER INFORMATION

For the purposes of this Agreement, "Taxpayer Information" shall include any and all non-public personal information, financial data, tax returns, schedules, financial statements, Social Security Numbers (SSN), Employer Identification Numbers (EIN), bank account numbers, income records, and any other proprietary or personal documents or data provided by the Taxpayer to the Recipient, or obtained by the Recipient on behalf of the Taxpayer.

3. CONFIDENTIALITY AND NON-DISCLOSURE

- A. The Recipient agrees to hold all Taxpayer Information in the strictest confidence and shall not disclose, publish, or disseminate any portion thereof to any third party without the express prior written consent of the Taxpayer.
- B. The Recipient shall restrict access to Taxpayer Information solely to those employees, contractors, or agents who have a legitimate business need to know such information to perform the designated services, and who are bound by confidentiality obligations no less restrictive than those contained herein.

4. PERMITTED USE

The Recipient shall use the Taxpayer Information solely for the purpose of preparing, filing, consulting, or representing the Taxpayer in tax and financial matters as authorized, and for no other commercial or personal purpose whatsoever.

5. DATA SECURITY MEASURES

The Recipient warrants and represents that they maintain, and will continue to maintain, robust physical, electronic, and procedural safeguards designed to protect Taxpayer Information. These measures include, but are not limited to:

1. Encryption of data both at rest and in transit.
2. Secure, password-protected access controls on all devices and networks processing Taxpayer Information.

3. Restricting physical access to locations where paper records are stored.
4. Immediate destruction or secure deletion of temporary drafts or unneeded duplicates of Taxpayer Information.

6. BREACH NOTIFICATION

In the event of any unauthorized access, acquisition, alteration, or disclosure of Taxpayer Information (a "Security Breach"), the Recipient shall notify the Taxpayer in writing immediately, and in no event later than _____ hours after becoming aware of the breach. The Recipient shall, at its own expense, take all necessary steps to mitigate the breach and cooperate fully with the Taxpayer.

7. TERM AND RETURN OF INFORMATION

- A. This Agreement shall commence on the Effective Date and shall remain in effect indefinitely or until terminated in writing by either Party.
- B. Upon written request by the Taxpayer, or upon termination of services, the Recipient shall promptly return to the Taxpayer or securely destroy all originals and copies of Taxpayer Information, and certify in writing that such destruction or return has been completed.

8. GOVERNING LAW

This Agreement shall be governed by and construed in accordance with the laws of the State of _____, without giving effect to any principles of conflicts of law.

IN WITNESS WHEREOF, the Parties hereto have executed this Taxpayer Privacy and Data Protection Agreement as of the Effective Date written above.

TAXPAYER (Disclosing Party):

RECIPIENT (Receiving Party):

Signature

Signature

Printed Name

Printed Name / Title

Date

Date