TAX RETURN DATA SECURITY AND CONFIDENTIALITY AGREEMENT

This Tax Return Data Security and Confidentiality Agreement (the "Agreement") is entered into as of _____, by and between:

Disclosing Party: _____

Receiving Party: _____

1. PURPOSE

The Disclosing Party desires to disclose certain highly sensitive financial and tax information, including but not limited to federal, state, and local tax returns, schedules, forms, W-2s, 1099s, and supporting financial documentation, to the Receiving Party for the sole purpose of _____.

2. DEFINITION OF CONFIDENTIAL INFORMATION

For purposes of this Agreement, "Confidential Information" shall include all tax returns, financial statements, bank statements, social security numbers, taxpayer identification numbers, and any other financial or personal data provided by the Disclosing Party to the Receiving Party, whether disclosed orally, in writing, or in electronic format.

3. OBLIGATIONS OF RECEIVING PARTY

The Receiving Party agrees to maintain the strict confidentiality of the Confidential Information and shall:

- Hold and maintain the Confidential Information in the strictest confidence and take all reasonable administrative, physical, and technical safeguards to prevent unauthorized access, use, or disclosure.
- Restrict access to the Confidential Information solely to employees, agents, or professional advisors who have a legitimate "need to know" and who are bound by confidentiality obligations no less restrictive than those contained herein.
- Not copy, reproduce, or distribute the Confidential Information except as strictly necessary to fulfill the purpose outlined in Section 1.
- Comply with all applicable federal, state, and local data protection and privacy laws, including but not limited to Internal Revenue Code Section 7216, where applicable.

4. PERMITTED DISCLOSURES

The Receiving Party may disclose Confidential Information only if required to do so by a valid court order, subpoena, or applicable law, provided that the Receiving Party gives the Disclosing Party prompt written notice of such requirement (to the extent legally permissible) so that the Disclosing Party may seek a protective order or other appropriate remedy.

5. TERM AND DESTRUCTION OF DATA

The obligations of this Agreement shall survive the termination of the business relationship between the parties. Upon the written request of the Disclosing Party, or immediately upon the completion of the purpose described in Section 1, the Receiving Party shall securely destroy or return all physical and electronic copies of the Confidential Information and certify such destruction in writing to the Disclosing Party.

6. 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. In the event of a breach or threatened breach, the Disclosing Party shall be entitled to seek injunctive relief in addition to any other remedies available at law or in equity.

7. GOVERNING LAW

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

IN WITNESS WHEREOF, the parties have executed this Tax Return Data Security and Confidentiality Agreement as of the date first written above.

DISCLOSING PARTY:	**RECEIVING PARTY:**
_____	_____
SIGNATURE	SIGNATURE
_____	_____
PRINTED NAME	PRINTED NAME
_____	_____
TITLE	TITLE
_____	_____
DATE	DATE