TAX RETURN CONFIDENTIALITY & NON-DISCLOSURE AGREEMENT

This Tax Return Confidentiality and Non-Disclosure Agreement is entered into on this_____ day of_____, 20____, by and between:

Client (Disclosing Party): _____

Tax Preparer (Receiving Party): _____

Collectively referred to herein as the "Parties."

1. Purpose

The Client wishes to disclose certain proprietary, personal, and financial information to the Tax Preparer solely for the purpose of preparing, filing, and/or consulting on the Client's federal, state, and/or local tax returns.

2. Definition of Confidential Information

"Confidential Information" shall include, but is not limited to, all tax returns, W-2 forms, 1099 forms, financial statements, bank records, Social Security Numbers, Employer Identification Numbers, sources of income, deductions, assets, liabilities, and any other personal or financial documentation provided by the Client to the Tax Preparer for tax preparation purposes.

3. Protection of Confidential Information

The Tax Preparer agrees to:

a. Hold the Confidential Information in strict confidence and use the same level of care to prevent unauthorized disclosure as they would use for their own confidential data.

b. Use the Confidential Information solely for the performance of tax preparation, planning, and related consulting services for the Client.

c. Restrict access to the Confidential Information to only those employees, partners, or authorized representatives who must have access to perform the tax services, and who are bound by similar confidentiality obligations.

d. Not disclose, copy, distribute, or disseminate the Confidential Information to any third party without the express prior written consent of the Client, except as required by law.

4. Permitted Disclosures

The Tax Preparer may disclose Confidential Information only when required to do so by applicable law, regulation, subpoena, or court order, provided that the Tax Preparer provides the Client with prompt written notice of such requirement (to the extent legally permissible) so that the Client may seek a protective order or other appropriate remedy.

5. Term and Termination

The obligations under this Agreement shall survive the completion of the tax preparation services and shall remain in effect indefinitely, or until such time as the Confidential Information enters the public domain through no fault of the Tax Preparer.

6. 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 Agreement as of the date first written above.

CLIENT (DISCLOSING PARTY)

Signature

Printed Name

Date

TAX PREPARER (RECEIVING PARTY)

Signature

Printed Name

Date