

Client Agreement for Sharing Financial Information

This Client Agreement ("Agreement") is entered into by and between:

- **Client Name:**
- **Date:**

The Client hereby authorizes [Name of Recipient/Company] to access and share the Client's financial information for the purposes described below:

Purpose

Scope of Information

The following financial information may be shared:

- Account Statements
- Bank Transactions
- Investment Portfolios
- Tax Documents
- Other:

Duration of Consent

Client's Signature

Signature:

Date: