

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: