

Client Confidentiality Agreement

Date: [Insert Date]

Client Name: [Insert Client Name]

Address: [Insert Client Address]

Dear [Client Name],

This letter serves as a formal agreement regarding the confidentiality of the information shared between us during our financial advisory relationship. As your financial advisor, I acknowledge the importance of protecting your personal and financial information.

- Confidential Information**: All information shared with me, including but not limited to financial statements, tax returns, investment details, and personal identification information, will be considered confidential.
- Obligation of Confidentiality**: I will not disclose any confidential information to any third party without your prior written consent, unless required by law.
- Exceptions**: The obligations of confidentiality do not apply in cases where the information is publicly available or prior to its disclosure was already known to me.
- Duration**: This confidentiality obligation extends indefinitely, lasting even after the termination of our advisory relationship.

By signing below, you acknowledge and accept the terms of this confidentiality agreement.

Sincerely,
[Your Name]
[Your Title]
[Your Company Name]

[Client Signature]
Date: _____