



## Christopher Rees

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### CONFLICT OF INTEREST WAIVER

Tax Form: \_\_\_\_\_ (1040, 1065, 1120, 1099, etc.)  
(One form per signature below)

Year(s): \_\_\_\_\_

A conflict of interest exists when disclosure to a third party of one client's income tax return and financial information (1) is potentially adverse to another client, or (2) if there is a significant risk that the disclosure will be materially limited by the tax practitioner's responsibilities to another client, to a former client, or to a third party or, (3) by a personal interest of the practitioner.

Practitioners may not disclose a client's information if such disclosure causes or appears to cause a conflict of interest, unless:

\* The practitioner reasonably believes that he will be able to disclose such information competently and diligently for each affected client, former client, or third party without adverse effects to them;

\*\* AND \*\*

\* The disclosure is not otherwise prohibited by law;

\*\* AND \*\*

\* Each and every potentially affected client, former client, and third party waive, formally and in writing, the practitioner's possible conflict of interest and damages arising thereto with respect to said disclosure of information.

The most common practitioner conflicts of interest arise with respect to married persons filing joint or separate tax returns, members of limited liability companies, shareholders of corporations, etc. **Hence, I require that you and each affected person execute the waiver**

**below before I proceed to disclose such information to a third party.**

**WAIVER OF THE CONFLICT OF INTEREST**

I, \_\_\_\_\_ hereby acknowledge that I am requesting Chris Rees to disclose, to a third party, income tax return and other financial information. I acknowledge that there is a potential for a conflict of interest in the handling of this matter. Nevertheless, I am now, and in the future will be, willing to waive any such conflict of interest, and any claims for damages to me arising from such conflict of interest, and to have Chris Rees disclose such tax return and other financial information to the third party.

(**BOTH** pages of this form must be provided to Chris Rees by each affected party for a single Tax Form specified at the top of page 1.)

Signature:

\_\_\_\_\_ Date\_\_\_\_\_