



# Client Authorization & Data Access Form

**Amy Workflow Use Only** Internal routing strip

Lead ID: \_\_\_\_\_ Client ID: \_\_\_\_\_ Document Status: Draft / Sent / Received / Approved / Archived  
 Workflow Stage: Authorization Assigned Reviewer: \_\_\_\_\_ Review Date: \_\_\_\_\_

Purpose: This form authorizes Garcia & Associates Analysis LLC to review, analyze, organize, and report on financial and business information voluntarily provided by the client or made accessible by the client for the limited purpose of providing consulting services.

## CLIENT INFORMATION

Client Full Legal Name	Business Name
_____	_____
Authorized Representative	Title / Role
_____	_____
Phone Number	Email Address
_____	_____

## AUTHORIZED INFORMATION

The client authorizes Garcia & Associates Analysis LLC to access, review, organize, analyze, and report on the following information when provided by the client or made available through client-approved channels:

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Bank Statements      | <input type="checkbox"/> Profit & Loss Statements | <input type="checkbox"/> Balance Sheets      |
| <input type="checkbox"/> Tax Returns          | <input type="checkbox"/> Payroll Reports          | <input type="checkbox"/> Revenue Reports     |
| <input type="checkbox"/> Expense Reports      | <input type="checkbox"/> Business Records         | <input type="checkbox"/> Invoices / Receipts |
| <input type="checkbox"/> Loan or Debt Records | <input type="checkbox"/> Contracts / Agreements   | <input type="checkbox"/> Other               |

## SCOPE OF AUTHORIZATION

- Review and Analysis.** Garcia & Associates Analysis LLC may review and analyze client-provided business and financial information to identify trends, operational patterns, reporting gaps, risk indicators, and performance improvement opportunities.
- Organization and Reporting.** Garcia & Associates Analysis LLC may organize data, prepare summaries, create analytical reports, produce executive dashboards, and provide consulting observations based on the information supplied.
- Limited Use.** Information may be used only for agreed consulting, monitoring, reporting, analytical, onboarding, and administrative purposes related to the client engagement.
- No Independent Verification Requirement.** Unless expressly agreed in writing, Garcia & Associates Analysis LLC is not responsible for independently verifying the completeness, legality, tax treatment, or accounting accuracy of client-provided information.

## CLIENT ACKNOWLEDGEMENTS

- Client confirms that the client has authority to provide or authorize access to the information submitted for review.
- Client is responsible for ensuring that all information provided is complete, accurate, lawful, and current.
- Client understands that incomplete or inaccurate records may affect the reliability of any analysis, report, recommendation, or consulting observation.
- Client acknowledges that Garcia & Associates Analysis LLC does not provide legal advice, tax advice, accounting representation, audit representation, investment advice, or regulated financial services.
- Client acknowledges that Garcia & Associates Analysis LLC does not guarantee financial outcomes, revenue increases, financing approvals, profits, tax results, or business success.



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## CONFIDENTIALITY STATEMENT

Garcia & Associates Analysis LLC will use reasonable care to protect client-provided information and will not intentionally disclose confidential client information to third parties except as required to perform authorized services, as approved by the client, or as required by law. Confidentiality obligations do not apply to information that is publicly available, independently developed, previously known without restriction, or lawfully obtained from another source.

## AUTHORIZATION PERIOD

Authorization Start Date	Authorization End Date
_____	_____
Ongoing Until Revoked?	Project / Engagement Name
_____	_____

If no end date is provided, authorization remains effective for the duration of the active client engagement and any reasonable post-engagement administrative closeout period, unless revoked earlier in writing.

## REVOCATION OF AUTHORIZATION

The client may revoke this authorization by providing written notice to Garcia & Associates Analysis LLC. Revocation will not affect work already performed, fees already incurred, records previously reviewed, or reports already prepared prior to receipt and processing of the revocation notice.

## AUTHORIZATION SIGNATURES

Client Signature:	Consultant Signature: Electronically signed
_____	_____
Client Printed Name:	Consultant Printed Name: Electronically signed
_____	_____
Date:	Date:
_____	_____