

Sample Joint Marketing Agreement Addendum

Regulatory Risk Monitor offers this third-party marketing agreement addendum from a small Oklahoma bank as an example of the type of privacy protection that should govern your vendor relations.

(Third-party vendor) acknowledges that all customer information and documents disclosed by (the bank) to (third-party vendor) or their representatives, or which come to the attention of (third-party vendor) or their representatives during the course of its performance of services under this Agreement, constitute valuable assets of and are proprietary to (the bank). (Third-party vendor) also acknowledges that (the bank) has a responsibility to its customers and employees to keep bank records and information confidential and proprietary.

Therefore, in accordance with the requirements of 12 CFR 332.13 of the Gramm-Leach-Bliley Act privacy rules, (third-party vendor) agrees not to disclose, either directly or indirectly, to any person, firm or corporation information of any kind, nature or description concerning matters affecting or relating to the business of (bank) unless the information is already in the public domain.

This provision shall survive termination of the agreement.

Dated this _____ day of _____, 200__

(Bank)

(Third-party vendor)

Source: Stock Exchange Bank, Woodward, Okla., based on American Bankers Association's *Seven Steps to Creating a Privacy Policy*. .