



REVIEW GUIDANCE FOR PARTNER ENGAGEMENT LETTER - SCHEDULE C (AUTHORIZED PERSONS)

Use this guidance to confirm Schedule C identifies the people authorized to access information, act in defined roles, or participate in the engagement.

Review focus

- Confirm each authorized person is correctly named.
- Confirm role, organization, access, and authority are clear.
- Confirm additions and removals are controlled.
- Confirm confidentiality and conflict obligations apply.
- Confirm the schedule is current before relying on it.

Value Realization lens

Schedule C supports Value Realization by ensuring work is performed and information is accessed by the right people under clear authority.