



REVIEW GUIDANCE FOR PARTNER ENGAGEMENT LETTER - SCHEDULE D (EXTENDED CONFIDENTIALITY)

Use this guidance to confirm Schedule D adds any needed confidentiality controls for the engagement context.

Review focus

- Confirm why extended confidentiality is needed.
- Confirm covered information, persons, systems, and use cases.
- Confirm permitted disclosures and operational access.
- Confirm survival, return, destruction, and incident obligations.
- Confirm consistency with the base confidentiality instrument.

Value Realization lens

Schedule D supports Value Realization by permitting necessary collaboration while controlling information risk that could impair trust, leverage, or execution.