

In support of the goals of the Internal Revenue Service (IRS) Stakeholder Partnerships, Education and Communication (SPEC) organization, the \_\_\_\_\_ piece(s) of equipment shown at the end of this agreement is loaned to:

Name of Recipient (Organization/Individual)	Telephone Number
Street Address	
City, State, Zip Code	e-mail address

The recipient certifies that the equipment will be used for volunteer electronic tax return preparation and filing. It may also be used for related activities associated with supporting the volunteer program, such as:

- Training and educating volunteers and taxpayers about individuals' rights and responsibilities under the Internal Revenue Code;
- Reaching out to taxpayers to inform them of the services of the volunteer organization;
- Promoting activities to assist the volunteer organization in increasing its ability to deliver related tax matters or services without the direct involvement of SPEC; and
- Administering the activities of the volunteer operation as they relate to volunteer electronic tax return preparation and filing.

The equipment remains the property of the IRS. The equipment may not be used for commercial purposes. It may not be sold or otherwise disposed of. The IRS may terminate this Agreement and require the return of the equipment.

The recipient agrees to safeguard the equipment by providing appropriate physical security to prevent theft. Appropriate physical security is defined as being in the control of a volunteer at all times while in use and being in a controlled, limited access (preferably) locked location when not in use. The recipient also agrees to utilize system access security (password protection of information) while return data is present on the equipment. The recipient agrees to take reasonable care of the equipment and protect it from unnecessary abuse by themselves or others. Reasonable care includes protection of equipment from hazards such as liquids, food, smoke and unsafe handling of equipment when moving. In addition, recipient agrees to notify SPEC within 48 hours if the equipment is damaged, broken, lost or stolen. In the event of theft, the recipient is required to notify local law enforcement immediately and file the appropriate reports.

IRS will provide the operating system and tax preparation software along with any related support products. The recipient may load licensed software on the equipment required to support the volunteer electronic federal tax return preparation and filing program. The recipient also confirms they have a valid license for the software. Software required for operating peripheral devices like CD-ROMs, modems, and printers are acceptable and will be provided by the peripheral device owner. All software and software documentation may only be used in accordance with the terms and conditions of the Software License Agreements. Copyright laws of all software and software documentation will be respected. The related software loaded must not conflict with the primary purpose of federal electronic tax return preparation and must be removed if space limitations or operation efficiency dictate.

# PROPERTY LOAN AGREEMENT

An Internet Service Provider's software may be installed on the equipment to facilitate program communications if accompanied by an anti-virus software product. Frequent update of the anti-virus software is required and is the responsibility of the recipient. All costs associated with the use of an ISP or anti-virus product will be the responsibility of the recipient. Prior to return of the equipment to IRS, the recipient will remove all non-IRS software. No additional hardware may be installed without the written consent of IRS.

Complete the Alternate Recipient Contact Information and Alternate Recipient Signature blocks if the equipment is assigned to someone other than the recipient shown above.

Barcode	Equipment Type	Serial Number	Alternate Recipient Contact Information (Include Name, Address, Phone and E-mail)	Alternate Recipient Signature	Date Returned IRS/Receiving Employee Signature

Recipient's Signature \_\_\_\_\_ Date \_\_\_\_\_

SPEC Official's Signature \_\_\_\_\_ Date \_\_\_\_\_

## SPEC Contact Address

**Complete only those blocks that apply to your office.**

Name of Contact					Telephone Number	
Street Address				City, State, ZIP Code		
SPEC Office Symbols	Mail Stop	Area	Territory	Post of Duty	Email Address	

**Privacy Act Notice:** The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.  
 Our legal right to ask for information is 5 U.S.C. 301.  
 We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers.  
 Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.