

CLIENT PRIVACY STATEMENT AND CONSENT

Our Privacy Policy and Commitment to Protecting Your Privacy

I/We value your business and thank you for your confidence in choosing our firm as your source for advice and products. As our client, you entrust us with your personal information. We respect that trust and want you to be aware of our commitment to protecting the information you share with us in the course of doing business with us.

Your Rights as they pertain to Your Personal Information

- You have the right to know why an organization collects, uses or discloses your personal information.
- You have the right to expect an organization to handle your information reasonably and to not use it for any other purpose other than the one to which you consented.
- You have the right to know who in an organization is responsible for protecting your information.
- You have the right to expect an organization to protect your information from unauthorized disclosure.
- You have the right to inspect the information an organization holds about you and make sure it is accurate, complete and current.
- You have the right to expect an organization to destroy your information when requested or when no longer required for the intended purpose.
- You have the right to confidentially complain to an organization about how it handles your information and to the Privacy Commissioner if need be.

How We Collect, Use and Disclose Your Information

By signing below, you give your consent for us to obtain, verify, and share your personal information, including **financial and medical information**, so that we may provide you with financial strategies, products and services, which best meet your needs.

This consent also allows for the sharing of information with any persons, financial institutions, businesses, or other parties with whom we deal. This may include service providers in jurisdictions outside of Canada, and would therefore be subject to the laws of those jurisdictions.

By signing below you consent to our firm to use and disclose this information in order to:

- Communicate with you in a timely and efficient manner
- Communicate with you by mail, email, internet or other electronic means
- Assess your application for investment, insurance and other services available to you by our firm
- Evaluate claims and underwriting risks when required
- Detect and prevent fraud
- Analyze performance results
- Act as required or authorized by law
- Provide printing, mailings and marketing information on products & services we offer

What We Will Not Do With Your Information

I/We do not sell client information to anyone. Nor do we share your information with organizations outside of our relationship with you that would use it to contact you about their own products or services.

We Strive to Protect Your Personal Information

All employees, associated advisors and service provider who are granted access to your records understand the need to keep this information protected and confidential. They know they are to use the information only for the purposes intended and this expectation is clearly communicated. We've also established physical and systems safeguards, along with proper processes, to protect your information from unauthorized access or use.

Your Privacy Choices

You may withdraw your consent at any time (subject to legal or contractual obligations and on providing us reasonable notice) by contacting our Privacy Officer. Please be aware that withdrawing your consent may prevent us from providing you with requested products or services. We may occasionally use your personal information to advise you of products or services we believe may be of interest to you or fit your personal circumstances. If you would rather not receive this type of communication, please advise our Privacy Officer.

Our Privacy Officer is: *Name of Advisor/Delegate*

Address &

Contact information

By signing below, you give your consent to collect and maintain your personal information in your client file.

Signed this ___ day of _____ 20__.

By: _____

By: _____