LOWDENCLEAR
WEALTH MANAGEMENT
Financial Planning & Insurance made "loud and clear"

Privacy Commitment

Protecting the privacy of your personal information is important to us and to the companies whose products and services we offer. We are committed to collecting, using, and disclosing your personal information responsibly.

We will create, and continue to maintain, a client file containing your personal information such as: contact information, financial information, records of meeting and phone calls, general correspondence and any instructions given to us.

This information will be used to assess your financial situation, offer products and services that may be of interest and benefit to you, and provide ongoing client service.

Your personal information in your client file will be disclosed to only the following:

- Employees and authorized persons of Lowdenclear Wealth Management Inc.
- Companies I represent and their employees and agents, for the purpose of providing, or seeking to provide financial products or services to you (ie: insurance carrier, investment firm and/or MGA).
- Persons or entities to which you have granted access (ie: lawyer, accountant).
- Persons or entities allowed access by law.

In accordance with applicable law and upon your request, I will provide you access to your personal information in your file for your review. You have the right to request corrections to your personal information.

For your client file, should you provide me with any additional personal information (including, but not limited to the items below), you specifically acknowledge you're providing me these items at your own risk. Of particular note, you release me and the companies I represent, and those acting on behalf of me or those companies, from any liability in connection with these documents:

- Insurance policies and/or financial statements.
- Copies of life insurance applications, in whole or in part, including medical and lifestyle information
- Wills and/or Power of Attorney

You agree any such documents may be converted by me into another format, without the original being retained.

I have reviewed the above information and given consent to my financial advisor at Lowdenclear Wealth Management Inc., and those acting under my advisor's direction, to create and maintain a file for me in accordance with the above. I have the right to later revoke my consent, subject to legal and contractual limitations.

☐ I consent to my personal information being maintained in a joint client file with my spouse, and I consent to my personal information within this file being disclosed to my spouse.

Client 1: ______________________ Date ______________

Client 2: ______________________ Date ______________