



SHARING OF INFORMATION

Last Name of Client	First Name & Middle Initial
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Last Name of Joint Client	First Name & Middle Initial
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In order to assist in the implementation of the Services provided pursuant to, and defined in the Planning Services Agreement, it may be necessary to share and obtain some of your private and confidential information with/from other professional advisors.

Please indicate your wishes below for the sharing of information with and from other affiliated professionals and companies by checking the applicable response below.

If I/We want to revoke my/our consent, I/We will provide written notice to: The Family Office Ltd. #202A 221 - 10th Ave S.E. Calgary AB. T2G 0V9 and my/our revocation will go into effect when I/we receive acknowledgement by The Family Office Ltd.

Information to be shared with/by:

LAWYER	
FIRM	

ACCOUNTANT	
FIRM	

INSURANCE ADVISOR	
FIRM	

INVESTMENT ADVISOR	
FIRM	

HUMAN RESOURCES	
COMPANY	

Identify why and what information is being shared:

Lawyer

The lawyer may be given or provide a copy of your existing legal documents. This information will be shared due to the client's updating the details of a legal document or drafting of new documents. This updating or drafting of new documents is usually done by using the legal questionnaire supplied by the lawyer or from the notes in the client organizer.

- Wills
- Power of attorney
- Personal directive
- Prenuptial
- Trust
- Divorce

Accountant

The accountant may provide or be given a copy of the client's tax notes, notice of assessment or a copy of the annual tax filing. These notes outline the tax issues and related information required. To support and supply the required information from the tax notes copy of related tax documents will be shared

- Capital losses
- Tax withholding
- AMT
- RRSP contributions
- RESP withdrawals
- International tax planning

Insurance Advisor

The insurance advisor may provide or be given a copy of the client's organizer risk management notes. These notes outline the existing policies a client has in place as well as the specific details of each policy. When requesting a quote for insurance it is important for the advisor to know the existing coverage. A quote request form is shared with the insurance advisor outlining what analysis and products are required.

- Life
- DI
- Critical Illness
- Health Care Coverage
- Long Term Care

Investment Advisor

The investment advisor may provide or be given a copy of the client investment inventory from the organizer. This inventory outlines the existing investments the client has and the objective of each investment. For an investment advisor to design a proper investment policy statement they need to know the balance and mix of all investment assets.

- IPS
- NCAF

Human Resources

As part of your Wealth Plan we often need to discuss with your group benefits administrator information regarding your

- Group benefits
- Pension
- Company matched savings programs
- Compensation

This information will only be shared by/with those agents authorized by The Family Office Ltd.

Use, disclosure and retention of this shared information is limited to the time necessary for providing the services requested:

- Yes, **THE FAMILY OFFICE LTD.** may share with and obtain information from the individuals and organizations noted above, or;
- No, **THE FAMILY OFFICE LTD.** may not share with nor obtain information from the individuals and organizations noted above.

This consent is in addition to any client consent provided regarding sharing of client information provided pursuant to the new client application form.

Client Signature

Date

Joint Client Signature

Date