



Representative Disclosure Form

License and Jurisdiction

I am licensed as a life and health insurance agent in British Columbia, Alberta, Yukon, Ontario, Prince Edward Island, New Brunswick, and Nova Scotia.

Representation

I represent several insurers and I place most of my business with the companies indicated below:

- BMO Insurance
- Sunlife
- Canada Life
- Manulife

Relationship with companies I represent

No insurance company holds an ownership interest in my business, nor do I hold an interest in any company.

Compensation

If you choose to purchase a product through me, I will be paid a sales commission by the company that provides the product you purchase. I may receive a renewal of service commission if you keep that policy in force. If my sales reach a certain level, I may be eligible for additional compensation, such as bonuses, and other benefits and travel incentives such as conferences.

Life Insurance and Continuing Education

In order to maintain my life license, I am required to meet mandatory continuing education. Where applicable, I meet these educational requirements through attendance at various seminars and industry meetings.

Conflict of Interest

I confirm that I have no conflict of interest. I take the potential of a conflict of interest seriously. I will notify you if there is conflict of interest of which I become aware in regard to my recommendation to you. My overall recommendations will take into consideration and will be based solely on my analysis of your financial security needs.

More Information

Should you require additional information about my qualifications or the nature of my business relationships, I would be pleased to assist you.

Agent Name

AgentName@acceptiv.com

Phone