



Part of the PlanPlus Global Awards Program

Release to use the Clients Real Name

To the 2019 PlanPlus Canada Financial Planning Awards judging panel for _____

My advisor _____ explained to me that they are entering a financial planning competition. The competition is adjudicated on the basis of the quality of my advisors work, and the value of the advice they have provided to me.

They selected my file as their entry. I understand that should my advisor's entry be chosen as a finalist that an international panel of judges will need to look at the actual plan(s) that was provided for me by my advisor. In order to assure anonymity, the names and any identifying information on the plan are removed before providing the plan(s) to the judges.

In the event that my advisor wins, I will allow my name to be used only for publicity purposes only. No details of my situation will be shared with anyone other than the international panel of judges. I understand that each judge signs a confidentiality agreement and my file will be purged as soon as the competition is over.

I would also agree to speak with a judge or a publicist about the services that I received. I understand that the only purpose of any publicity is to promote future competitions, and the only purpose of using my real name is to give the competition credibility.

Dated this _____ day of _____, 2019 at _____

CLIENT

WITNESS