

# PRIVACY POLICY

## Respecting your privacy

I, **Max Jacob Becker-Pos** (“Advisor”) am committed to protecting your privacy and to comply with the federal Personal Information and Electronic Documents Act (PIPEDA) and applicable provincial privacy laws. I maintain the highest standards of confidentiality to ensure the protection of your personal and confidential information (“information”).

To assist me in meeting these goals, I have a detailed Privacy Policy, which follows. If you have any questions or comments, I would be pleased to hear from you. Simply contact me at:

**E-Mail:** [max@abundancewealthcommunity.com](mailto:max@abundancewealthcommunity.com)

**Phone:** 604.704.3698

**Attn.:** Max Becker-Pos

**Address:** South Granville, Vancouver BC

## Privacy Policy

**Accountability:** I am responsible for the information that I receive from you. I will safeguard your information in whatever form it is held.

**How I collect, use, share, disclose and retain your information:** I collect all personal, corporate, financial and related information with your consent and use and retain it solely for the purposes of providing advice and to ensure that any products or services you purchase through me are provided efficiently and accurately. I confidentially convey your information to insurers through wholesale organizations known as Managing General Agencies (“MGAs”), Global Pacific Financial Services Ltd. and/or Barrington Wealth Partners Inc., who are contracted to provide sales support, as well as any third party service providers that the MGA may engage to assist in the provision of the sales support. I only collect and keep information that helps me formulate advice, including personal, financial and health information. With your consent, I may share this information with others to get you help in areas outside of my areas of expertise. I am required to retain much of the information I collect for regulatory reasons including demonstrating that the recommendations I make are suitable and address your identified needs.

**Accuracy of information:** In order to make appropriate recommendations, I must receive accurate information. Upon request, you may review the information I retain about you. I will attempt to update the information I hold in my records to determine whether the recommendations I made are still appropriate in light of changes in your circumstances. I also rely on you to provide regular updates to me.

**What I will NOT do with your information:** I do not sell your information to anyone who would use it to contact you about their own products or services nor do I share your information with organizations outside of my relationship with you.

**I strive to protect your Information:** All employees, representatives, affiliated advisors, wholesale organizations and suppliers that are granted access to client records are required by law and regulation to keep this information protected and confidential and to use the information only for the purposes identified. Information that is no longer required for the intended original purpose will be destroyed. I’ve also established physical and systems safeguards, along with proper processes, to protect client 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 me with reasonable notice) by contacting me. Withdrawing your consent may prevent me from providing you with requested products or services and may end our business relationship. I may occasionally use your information to advise you of products or services that may interest you or fit your personal circumstances. If you would rather not receive this type of communication, please advise me at any time.

**Your right to complain:** You have the right to complain confidentially to me, to the insurer and to the Privacy Commissioner of Canada if need be.

Office of the Privacy Commissioner of Canada: 30 Victoria Street, Gatineau, Quebec K1A 1H3  
Toll-free: 1-800-282-1376 | Website: <https://www.priv.gc.ca/en>

I acknowledge I received a copy, read and agree to the terms of the Privacy Policy as outlined above.

_____ CLIENT SIGNATURE	_____ DATE (YYYY/MM/DD)	<u>Max Jacob Becker-Pos</u> ADVISOR NAME	_____
_____ CO-CLIENT SIGNATURE	_____ DATE (YYYY/MM/DD)	_____ ADVISOR SIGNATURE	_____ DATE (YYYY/MM/DD)