

ADVISOR DISCLOSURE

Company(ies) Mimi Lee represents, including but not limited to

Individual Life Insurance

- BMO Life
- CPP
- Desjardin Financial Securities
- Empire Life
- Equitable Life
- Humania
- Sun Life
- Industrial Alliance
- Manulife Financial
- Assumption Life
- RBC Life Insurance
- SSQ
- ivari
- Blue Cross
- La Capitale
- Foresters Life

Relationship with Company(ies) I Represent

No insurance company holds an ownership interest in my business, nor do I hold an interest in any insurance 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 (or service) commission if you keep that policy(ies) in force, or when you have your investments stay with me.

I may also be eligible for additional compensation, such as bonuses, or non-monetary benefits, such as travel incentives, depending on various factors such as the volume or persistency of business that I place with a particular company during a given time period.

Conflict of Interest

I take the potential of a conflict of interest seriously. I will notify you if there is a conflict of interest of which I become aware in regards to my recommendations to you. My overall recommendation will take into consideration, and will be based 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.

Acknowledgement

I, _____, have been informed of, and understand the implications of, this disclosure including any conflict of interest or potential conflict or interest associated with Mimi Lee in relation to any recommendations made.

Signature _____

Date _____