



Your privacy is important to us. This document sets out certain privacy practices we follow, including what type of information is collected, how the information is used, and with whom the information is shared.

For the purposes hereof, the term "All-Tax Group Ltd.", its successors and assigns. The terms "we" "our", and "us" designate individually and collectively the firm and your Financial Advisor (the "Advisor"). The terms "you" and "your" designate individually and collectively each of the undersigned identified that:

COLLECTION, USE AND DISCLOSURE OF YOUR PERSONAL INFORMATION

1. We may collect personal information from you and/or about you, such as:
 - a. Your name, address, telephone number, occupation, employer's name, birth date and social insurance number;
 - b. Identification, such as a valid driver's license or passport;
 - c. Your annual income, assets, liabilities and credit history;
 - d. Information about how you intend to use the Products and Services;
 - e. Information about third parties, such as your spouse, if you are applying for certain Product and Services; and
 - f. Information about beneficial owners, intermediaries and other parties.
2. We may collect your personal information, and use it, and disclose it to any person or organization as often as required for the following purposes:
 - a. To confirm identity;
 - b. To determine your eligibility for our Products and Services, as well as their suitability for you;
 - c. To share such information with financial institutions in connection with the administration and management of the Products and Services that you have requested;
 - d. To verify the accuracy and authenticity of the information that you have provided to us or that we have otherwise obtained about you by any reasonable means (including, for example, verifying any applicable information with your employer or your references);
 - e. To satisfy legal and regulatory requirements that we believe are applicable to us, including the requirements of any self-regulatory organizations to which we belong;
 - f. To enable interested persons or companies to carry out due diligence audits in the event of the sale, disposal or any other transfer of our business or assets or enable the conclusion and execution of any transaction in that respect; and including the transfer of information from any third party provider to the Specialist in the event those relationships end.
 - g. Where required by law; authorise All-Tax Group Ltd. to retain, use and exchange information without the undersigned's consent.
 - h. To provide you, in an ongoing manner, with the Products and Services that you have requested;
3. We may use your social insurance number to confirm your identity.

4. We do not directly provide all the Products and Services. For example, we rely on financial institutions, public registers, employers, professionals, our subsidiaries and affiliated companies, as well as, other third parties to provide you with the Products and Services (our "Providers"). You acknowledge that we may disclose information about you to our Providers in order for us to provide you with the Products and Services;
5. You acknowledge that we and our Providers may contact you (including, but not limited to, via telephone, facsimile, mail and email or other electronic means) on an ongoing basis to occasionally provide you with information about the Products and Services, news, events and other important messages that might be of interest to you, including but not limited to, products provided by All-Tax Group Ltd. its agents and third party providers. You agree that All-Tax Group Ltd. and our Providers can do so even if you may have registered your telephone number(s) in the National Do Not Call Registry and you provide your consent under Canada's Anti Spam Legislation (CASL);
6. We may receive compensation (in the form of money or other consideration) from our Providers or from third parties which may vary, depending on product(s) and service(s) accepted by you;
7. You will advise us promptly of any changes related to your information so that we may update our files accordingly; and
8. All the information that you provide to us is accurate and complete, and that we may rely exclusively on such information for the uses described in this document;
9. You jointly and severally release us and save us harmless against and from any claims in damages or otherwise arising from or in connection, use or disclosure of your personal information.

ACKNOWLEDGEMENT

By signing this form, you acknowledge that you have read and understood the terms and conditions in this document, and you hereby freely consent and agree to (i) comply with such terms and conditions, and (ii) authorize such collection, use and disclosure of your personal information for as long as necessary for the purposes set out herein and/or for any other period prescribed by law, even if you no longer do business with us or obtain any of our products and services. If you have provided information about another person or organization within the scope hereof, you further confirm that you are duly authorized to do so.

Applicant Name (please print)

Applicant Signature

Date

Applicant Name (please print)

Applicant Signature

Date