



BUSINESS ACTIVITY DISCLOSURE

As a Carte Wealth Management Inc. Representative I am engaged in various business activities including being a registered mutual funds salesperson, a licensed Life Insurance Advisor, a Director/Owner, and a Member of a non-Profit Organization, and represent separate companies for each purpose. As such, you may be dealing with more than one company depending on the products purchased, or services rendered. Remuneration also varies with the products purchased, or services rendered. I will be representing Carte Wealth Management Inc. for the sale of mutual fund products and will provide you with the name of the entities that I represent while conducting business as a licensed life insurance advisor, a Director/Owner, and a Member of a non-Profit Organization. The sale of life insurance products & services, the business activities of the company for which I am a Director/Owner, the activities of being a Member of a non-profit organization, are not the business of, or under the supervision of Carte Wealth Management Inc., and Carte Wealth Management Inc. will not be liable or responsible for such activities.

I, Magid Girgis, am a registered mutual fund salesperson represented by Carte Wealth Management Inc.

1. I am also an independent Licensed Life Insurance Advisor under contract with Qualifies Financial Services (QFS), an insurance Managing General Agency, and with Safebridge Financial Group an Insurance AGA, through which I place life insurance business. Any activity relating to my occupation as a licensed Life Insurance Advisor is not the business of, or under the supervision of, Carte Wealth Management Inc., and Carte Wealth Management Inc. will not be liable or responsible for such activities.
2. I am also the Director/Owner of Magid Girgis Financial Services Inc., an entity through which I place my life insurance business. Any activity relating to my position as a Director/Owner of this company is not the business of, or under the supervision of, Carte, and Carte will not be liable or responsible for such activities.
3. I am also a Member of the Canadian Association of Gift Planners (GTA Chapter), a national association for professional gift planners, whereby I participate in association networking events and in volunteer committees regarding member recruitment, member development, donor awareness and industry awareness. Any activity relating to my position as a member of this association is not the business of, or under the supervision of, Carte, and Carte will not be liable or responsible for such activities.

I, Magid Girgis, wish this distinction to be clear, and if you are not sure of the difference, let us discuss it, or I can suggest sources from which you can obtain the necessary explanation. Our self-regulatory organization, The Mutual Fund Dealers Association of Canada ("MFDA"), has rules which state that the distinction between these Dual Occupations must be clear and that you understand the difference for the purposes of this transaction.

By signing below, I, the Client, acknowledge that Magid Girgis is acting as my registered mutual funds salesperson on behalf of Carte Wealth Management Inc. and in no other capacity.

Signed at _____ on this _____ day of _____, 20 _____.

Client Name

Client Signature

Magid Girgis



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