

Personal Information Policy and Client Acknowledgment for Lucier-Mastronardi Insurance & Investments Inc.

The client hereby acknowledges that they have retained Lucier-Mastronardi Insurance & Investments Inc. (here after referred to as “the broker”) to act on their behalf to solicit and purchase insurance products and/or investment products.

As part of this agreement it is required that “the broker” collect and keep record of personal information pertaining to the client. The client acknowledges and grants permission to “the broker” to share this information with third parties as required to perform the services for which they have been retained. The sharing of this information shall be as permitted pursuant to the relevant privacy act and laws.

It is “the broker’s” official policy that all information collected shall be kept on file at “the broker’s” local office. Further, all information shall be available for the clients inspection upon request. The client may do so by contacting “the broker’s” privacy officer, **Mr. Nick Mastronardi**.

In event the client wishes to amend or rescind the permission granted by this agreement or make other inquiries of any kind related to “the brokers” privacy policies and standards they may do so by contacting “the broker’s” privacy officer, **Mr. Nick Mastronardi**.