

# CLIENT PRIVACY POLICY

## **Collection, Use and Disclosure of Personal Information**

The purpose for which *Wealthlink Financial Services Inc.* will collect, use and disclose your personal information is central to our providing you with our services. We believe that we cannot continue to provide you with those services if you object to our collecting, using and disclosing your information for those purposes. *Wealthlink Financial Services Inc.* will therefore consider that your continuing to maintain your account with us constitutes your consent to our continuing to collect, use and disclose your personal information. In future, if *Wealthlink Financial Services Inc.* identifies a new purpose for collecting, using or disclosing your information, we will seek your consent before doing so.

## **The Necessity for Personal Information**

*Wealthlink Financial Services Inc.* is a Managing General Agencies (MGAs) that is focused on building financial prosperity. Throughout the course of our relationship with you, your independent broker may collect personal information from you. This information typically includes “know your client” information about your personal circumstances, including your financial situation and your investment objectives, as well as information about your investments, banking information, social insurance number and medical information.

*Wealthlink Financial Services Inc.* uses such personal information only for the purposes of administering your account and complying with legal and regulatory requirements.

## **Disclosing Personal Information**

We may provide information to companies that perform services on our behalf (such as preparing and mailing statements or processing payments). We may also provide personal information to insurance carriers in which you invest or from which you obtain your insurance coverage, and receive information from them about your policy.

***Wealthlink Financial Services Inc.* does not disclose your information to any other organizations to use for their own purposes, and in particular never sells or trades your personal information.**

## **Administering Personal Information**

Many independent brokers are also licensed to sell other products, and may wish to provide advice and services to you in that capacity. If they do so, they are not acting on our behalf, and they will communicate with you themselves with respect to any other use or disclosure of the personal information they have collected.

## **Privacy Officer**

If you have any comments, inquiries or complaints about our handling of your personal information, we encourage you to contact your advisor at his/her branch office. Alternatively, you may contact our Privacy Officer at:

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