



Client Name: Click or tap here to enter text.

Phone#: Click or tap here to enter text.

As an Insurance Broker we must abide by regulatory requirements that play an important role in the insurance industry. By us following these regulations it allows you to be well informed when seeking our insurance services. RIBO our regulatory body requires us to ensure the following items are made clear and transparent to you before we move ahead with any new insurance policy on your behalf.

General Consent/Privacy Disclosure:

☐ ACCEPTED

☐ DECLINED.

We will need to obtain relevant personal information from you and from third parties to assess your insurance needs/requirements, such as your previous insurance company history or driver licensing authority (Ministry of Transportation records). This information may be provided to the prospective insurance companies for their consideration. Personal information will be kept in accordance with M&W's record retention and privacy policies. Do we have your permission to proceed?

Auto Insurance History Consent:

☐ ACCEPTED

☐ DECLINED.

For automobile and insurance company underwriting purposes, some insurers may require up to 25 yrs. of personal information. This may include historical driving records and claims history, pertaining to you and all other permitted drivers in your household or business. As a representative, do you confirm that you have obtained consent from all other permitted drivers to allow access to their personal information?

Marketing Consent:

☐ ACCEPTED

☐ DECLINED.

We would like permission to contact you by email and other electronic means to communicate with you, share helpful insurance information, and ask for your feedback. You may withdraw your consent at any time. M& W's Privacy Policy can be found on our website at www.martinandwright.com. Do we have your permission?

Credit Consent:

☐ ACCEPTED

☐ DECLINED.

To be able to obtain a potential discount on your insurance premium, do you consent to a soft credit check? Your consent will remain valid while you remain a customer with the insurer. You can withdraw your consent at any time; however, you may not benefit from certain discounts if you do.

Do you authorize the insurance company to collect your credit score from consumer reporting agencies and update it periodically?

Ownership Statement:

As an insurance brokerage we can offer you a choice of insurance solutions from different providers we represent. One such provider is Intact Insurance. We'd like you to know that we received financing from them to assist in the brokerage's perpetuation plan.

For more information please visit our website or click on the links below.

<https://irp.cdn-website.com/25076481/files/uploaded/RIBO%20-%20Conduct%20Sheet.pdf>

<https://irp.cdn-website.com/25076481/files/uploaded/CISRO%20Principles%20of%20Conduct.pdf>

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