Our commitment to protecting your privacy.

Protecting the privacy of your information is important to us and to the companies whose products and services we offer.

As your advisors, we create and maintain a client file(s) for you. This file(s) contains personal information related to you, which we gather in order to offer you products and services tailored to your financial situation, needs, and goals. We will also keep records of our meetings, phone calls, emails, and/or verbal instructions that you give us with regards to the business you have at Limestone Financial Inc.

When you purchase any product or service through Limestone Financial Inc., you will complete a specific application form(s). This application form(s) will also request your personal information that the company offering the product or service requires in order to underwrite, or issue, the product, provide ongoing service to you, and/or for other purposes, as described on the form(s). You will be signing such a form(s) to consent to the use of your information from the company for the purposes indicated on the form(s). From time to time, you may be required to complete an additional form(s) to confirm your request for changes to your product or service or to initiate a claim or benefit. We will keep copies of this form(s) in your client file and the company handling the request may also retain this information.

Your file(s) will be kept in the Limestone Financial Inc. office where you primarily conduct business. Access to information in your file(s) is limited to: Limestone Financial Inc. employees when the information is required for the performance of our duties; the companies we represent in providing, or seeking to provide, a product or service to you; persons you have granted access; and/or persons allowed by law.

Stephanie Milligan, BA, CLU, CFP & Tom Shillington, CET, CLU, CHS

Authorization

For additional personal information or documents

I ________________________, acknowledge that my advisor ________________________,
Please print your name Please print your Limestone Financial advisor's name
will create and maintain a client file(s) for me. This file(s) will contain personal information related to me, which will be gathered in order to offer me products and services tailored to my financial situation, needs, and goals. This may include records of my meetings, phone calls, emails, and/or verbal instructions that I give my advisor with regards to the business I have or business that I wish to consider with Limestone Financial Inc.

I also authorize and direct my advisor to hold additional personal information and/or documents (originals and/or copies) containing my personal information provided by me or with my authorization in my client file(s).

I understand that "additional" personal information is personal information that extends what is required to be kept, as outlined above in the first paragraph of this Authorization. Examples of additional personal information may be, but is not limited to:

- an insurance policy;
- a copy of a life insurance application, in whole or in part, including medical and/or lifestyle information;
- a will;
- a power of attorney designation document;
- a marriage, birth, and/or death certificate;
- an income tax return, notice of assessment, and/or other financial information;
- mortgage and real property ownership papers;
- and/or a business or partnership agreement.

Any terms and conditions of my advisors' holding such documents will be fully understood between myself and my advisor at the time the documents are deposited with my advisor.

I understand that my file(s) will be kept in Limestone Financial Inc.'s ________________
Kingston/Brockville/Pembroke
office. Access to information in my file(s) is limited to: Limestone Financial Inc. employees when the information is required for the performance of their duties; the companies Limestone Financial Inc. represents in providing, or seeking to provide, a product or service to me; persons I have granted access; and/or persons allowed by law.

Client's name: ________________________ Signature: ________________________
Please print your name Please sign here

Advisor: ________________________ Date: ________________________