

\_\_\_\_\_, 20\_\_

\_\_\_\_\_  
\_\_\_\_\_

Re: Confidential Information

Dear \_\_\_\_\_:

You have agreed to provide us certain confidential information (the “Information”), which may include information about your personal financial and estate matters, the personal financial and estate matters of members of your family, and information pertaining to the financial or business activities of legal entities in which you or members of your family have interests (collectively “You”). The term “Information” does not include information, knowledge or data which (i) was or becomes generally available to the public other than as a result of any action or inaction by us or our officers, partners, employees, or agents (collectively “Agents”), or (ii) was or becomes available to us on a non- confidential basis from a source other than You or your representatives.

The Information is being provided to us for the limited purpose of reviewing such Information in connection with financial services we have been authorized to provide to You (the “Services”). As a condition to our being furnished the Information, we agree to treat the Information in accordance with the provisions of this letter.

We hereby agree that the Information will be used by us solely for the purpose expressed herein. We agree not to disclose the Information to any person, and to take all reasonable measures to keep the Information confidential; provided, that the Information may be disclosed to our Agents who need to know such Information for the purposes of assisting or advising us in connection with the Services, it being agreed that such Agents shall be informed by us of the confidential nature of such Information and that by receiving such Information they are agreeing to be bound by this letter.

Additionally we may suggest 3<sup>rd</sup> party financial product or service providers (“Providers”) as a means to implement the financial services discussed. The privacy policy for each Provider may be found on their website or can be provided to you by our Agents or by the Provider upon request.

Thank you,

Weyers McKeever Financial Partners

\_\_\_\_\_  
(print name)

By: \_\_\_\_\_  
(signature)