

Advisor Disclosure Form for WFG Insurance Agency of Canada Inc.

Date: July 08, 2022

Licenses & Jurisdictions

I am licensed as a life and health insurance agent in Manitoba/ Ontario ~~<province(s)>~~. ~~[In Quebec provide list by license class.]~~

Companies I represent

I represent the following insurers:

Assumption Life	IA Clarington	Manulife Group Insurance
Canada Protection Plan (CPP)	IA Excellence	Manulife Health and Dental
Empire Life	Industrial Alliance	Manulife Travel
Equitable Life	Ivari	RBC Insurance
Foresters	la Capitale	Sirius Benefits
		SSQ
		TIC Travel insurance
		Western Life (Everest Funeral Planning)

Relationship with Companies I Represent

No insurance company holds an ownership interest in my business nor do I hold an ownership interest in any insurance company.

Compensation

If you choose to purchase a product through me, I will be paid by the company that offers that product. The insurer will pay any monies to World Financial Group Insurance Agency of Canada Inc. (WFGIA), the insurance agency through which I conduct my business, who in turn will remit the applicable compensation to me.

I am compensated by a sales commission at the time of sale and may receive a renewal (or service) commission if you keep that policy in force. I may also be eligible for additional compensation such as bonuses, or non-monetary benefits such as travel incentives, depending on various factors such as the volume or persistency of business that I place with a particular company during a given time period.

Conflict of Interest

I take the potential of a conflict of interest seriously. I will notify you if there is a conflict of interest that I become aware of in regards to my recommendations to you. My overall recommendation will take into consideration and will be based on my analysis of your financial security needs.

More Information


Should you require additional information about my qualifications or the nature of my business relationships, I would be pleased to assist you.

Client Acknowledgement

I, Swetaben Hiren Patel // Hiren Ratilal Patel, have been informed of and understand the implications of this disclosure including any conflict of interest or potential conflict of interest associated with RAJESHKUMAR PATEL in relation to any recommendations made.



Client Signature



Agent Signature: