MAX FINANCIAL

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(905) 955-5000

Leveraged Loan Disclosure Form 1

You have explained to me, and I understand that:

- Borrowing to purchase life insurance products involves greater risk than purchasing using cash.
- I will need to repay the loan in full.
- I will need to pay all accumulated interest.
- There is the risk that the value of any related investment may decline over time.
- Leveraging magnifies both gains and losses.
- Both interest rates and investment value will fluctuate, and returns are not guaranteed.

Client Name: ______________________________

Client Signature: ______________________________

Date: ______________________________