S&V PLANNING CORPORATION THE BROKER'S EDGE™	# Website Design and Licensing Agreement

Between

S&V Planning Corporation

Suite #227 – 1175 Cook Street
Victoria, British Columbia, V8V 4A1

AND

(Please Print)

Advisor's Name: ______________________________

Company: ______________________________

Address: ______________________________

City/Town: ____________________ **Prov.**__________ **Postal Code** __________

Tel. (   ) ____________________ **Fax. (   )** ____________________

Cell (   ) ____________________

1. *Select Your Personal Website Address*

We provide you with a personal website address as part of our service:

Examples: www.JohnSmith.com www.SmithFinancialServices.com

Make three choices of what you would like to call your website: (Please print)

First Choice: www. ______________________________ .com

Second Choice: www. ______________________________ .com

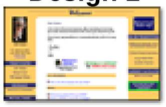
Third Choice: www. ______________________________ .com

NOTE: We'll activate your choice in order of preference. If none of your choices are available we'll contact you with other choices.

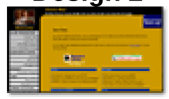
2. *Select Your Website Design*

Select your website from the designs below. View them in detail at *www.SVPlanning.com*

Design 1

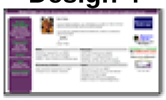


Design 2



Design 3

Design 4



Design 5

Design 6

Your website design choice is Design #____

3. *Select Features for Your Website*

Check those features you want on your site:

____Telephone #

____Cell #

____Address

____Photo (send us a 4 x 6 photo)

____Email (please select choice below)

____Existing email address: ________________________@___________________

OR

____I need email address to be set up

NOTE: You must have an email address. If you do not have one already, we'll assist you in obtaining one.

4. *Message To Clients Or Mission Statement (optional)*

___ No, do not place a message or mission statement on your website

___ Yes, place one of the following messages below on your website. Select ONE only.

___ Optional Message #1

"Life is full of financial decisions. Use my website to become better informed about life insurance products. Get today's GIC, mortgage and mutual fund quotes. Please contact me before making any financial decision."

OR

___ Optional Message #2

"Welcome to my web site. Financial Concerns? Need to review your Insurance? I am committed to helping you achieve your goals! Use my calculators, on-line presentations, Resource Centre and links to become better informed. Please call or email me to discuss your needs."

OR

___ Your Own Custom Message
Please print the message that you want to appear on your website. (Max 50 words)

____

____

____

____

____

5. *Mutual Funds*

Do you sell mutual funds? ___ Yes ___ No

If YES, name of your mutual fund dealer ____

6. *Select Mutual Fund Suppliers*

If you sell mutual funds, link your website to the following funds:

___Aegon	___Caldwell	___Hirsch
___ABC	___Clarington	___Mackenzie
___AGF	___Cundill	___Manulife
___AIC	___Dynamic	___Phillips Hager
___Acuity	___Ethical	___Sceptre
___Altamira	___Excel	___TD
___Beutel Goodman	___Fidelity	___Templeton
___CI Funds	___Guardian	___Trimark

List any other mutual funds you want links to: ______________________________________

NOTE: If you select any mutual funds the logo of your dealer will be placed automatically on your website for compliance purposes.

7. Select Life Insurance Suppliers

Link your web site to the following life insurance companies:

___AIG	___Empire	___Manulife
___AXA	___Equitable	___Pencorp
___Assumption Life	___Federated	___RBC Insurance
___Canada Life	___Freedom 55	___Standard Life
___Clarica	___Great-West Life	___Sun Life
___Desjardins	___Ind Alliance	___Transamerica
___Edge Benefits	___Ind Alliance Pacific	___Unity

List other life insurance firms you want links to: ____

List segregated fund companies that you want links to: ______________________________________

____

____

____

8. *Website Licensing Terms*

a) S&V Planning Corporation grants to Advisor a non-exclusive, personal, non-transferable license to use the Advisor's website. S&V Planning Corporation may modify its services and content of Advisor's website at any time for any reason and may provide modified versions of the content and services to Advisor without notice. S&V Planning Corporation has the right to discontinue products or services and the right to reassign addresses of Advisor's web site.

b) Advisor agrees not to translate, decompile, reverse engineer, disassemble, modify, reproduce, rent, lease, lend, sublicense, distribute, remarket or otherwise dispose of any portion of the web site services provided under this Agreement.

c) Advisor accepts sole responsibility for any and all materials provided by Advisor to S&V Planning Corporation that are placed on Advisor's web site, and Advisor represents that Advisor owns these materials or has permission to use and freely access these materials.

d) Advisor agrees to pay for website services by way of an automatic monthly withdrawal from Advisor's bank account on either the 5th or the 20th day of each month in which service is provided. A fee of $25 is charged for any NSF cheque.

e) Advisor agrees to contract for website services through S&V Planning Corporation for a minimum of 12 months. After 12 months, the advisor may terminate the contract with thirty (30) days notice. If an Advisor wishes to reactivate a website, a fee may be charged for the reactivation.

f) Advisor agrees that under no circumstances shall S&V Planning Corporation be liable for any special or consequential damages that result from the Advisor's or their clients' use of, or inability to use, the Advisor's website services under this agreement. The Advisor agrees that in no event shall S&V Planning Corporation's, or that of its suppliers', total liability to the Advisor for any damages, losses, and causes of action, including but not limited to negligence, arising out of the use by the Advisor of the services under this Agreement exceed the price paid by the Advisor for services under this agreement.

g) The term of service shall be month to month.

______________________________ __________________

Client Signature **Date**

______________________________ __________________

S&V Planning Corporation **Date**

Send this entire Agreement to:

S&V Planning Corporation
Suite 227 – 1175 Cook Street
Victoria, British Columbia V8V 4A1
Tel. (250) 388-6774 or 1 (800) 661-8879

Please Attach the Following:

1. ***Your Business Card***
2. ***A good size photo (if desired)***
3. ***A cheque in the amount $52.45 ($49.95+GST) payable to S&V Planning to cover the first month's payment***
4. ***A cheque marked VOID*** **to pay for monthly service**
5. ***Both pages of PAD agreement***

Note: A complete signed copy of this Agreement will be returned to you for your records.

PRE-AUTHORIZED PAYMENT AUTHORIZATION – TERMS AND CONDITIONS

I/We acknowledge that this Authorization is provided for the benefit of S&V Planning Corporation and the Processing Institution and is provided in consideration of the Processing Institution agreeing to process debits against my account in accordance with the Rules of the Canadian Payments Association.

I/We warrant and guarantee that all persons whose signatures are required to sign on the account have signed this agreement below.

I/We hereby authorize S&V Planning Corporation to draw on _______________________________ account number _____________
Name of Payor
with _______________________________________, for the purpose of paying monthly fees for website service.
Name of Payor's financial institution

This authorization may be cancelled at any time upon notice by the Payor. I/We acknowledge that, in order to revoke this authorization, I/We must provide written notice of revocation to S&V Planning Corporation.

I/We acknowledge that provision and delivery of this authorization to S&V Planning Corporation constitutes delivery by the Payor to the Processing Institution. Any delivery of this authorization constitutes delivery by the Payor.

The Payor and Payee agree to waive the pre-notification requirement set out in Section 7 of Appendix II of rule H4 of the Canadian Payments Association.

I/We undertake to inform S&V Planning Corporation, in writing, of any change in the account information provided in this authorization prior to the next due date of the PAD.

The account that S&V Planning Corporation is authorized to draw upon is indicated in the accompanying authorization. A specimen cheque for this account has been marked "VOID" and attached hereto.

I/We acknowledge that the Processing Institution is not required to verify that a PAD has been issued in accordance with the particulars of the Payor's Authorization including, but not limited to, the amount.

I/We acknowledge that the Processing Institution is not required to verify that any purpose of payment for which the PAD was issued has been fulfilled by S&V Planning Corporation as a condition to honouring a PAD issued or caused to be issued by S&V Planning Corporation on the Payor's account.

A PAD may be disputed by a Payor under the following conditions:

1. The PAD was not drawn in accordance with the Payor's Authorization; or
2. The authorization was revoked; or
3. Pre-notification was not received.

The Payor, in order to be reimbursed, acknowledges that a declaration to the effect that either (1), (2) or (3) took place, must be completed and presented to the branch of the Processing Institution holding the Payor's account up to and including 90 calendar days in the case of a personal PAD, or up to and including 10 business days in the case of a business PAD, after the date on which the PAD in dispute was posted to the Payor's account.

The Payor acknowledges that a claim on the basis that the Payor's Authorization was revoked, or any other reason, is a matter to be resolved solely between S&V Planning Corporation and the Payor when disputing any PAD after 90 calendar days in the case of a personal PAD or 10 business days in the case of a business PAD.

DEFINITIONS

Business PAD : Means a PAD (Pre-Authorized debit in paper, electronic or other form) drawn on the account of a Payor such as, but not limited to, a corporation, partnership, sole proprietorship, franchise, association, venture or enterprise, for the payment of goods and services related to commercial activities of the Payor.

Personal PAD : Means a PAD drawn on the account of a Payor for payments such as, but not limited to bill payments, membership fees, or other goods or services.

Pre-Authorized Payment Authorization

Personal PAD ☐
or
Business PAD ☐

Payor Name(s): ______________________________

Address: ______________________________

City & Province: ______________________________

Phone Number: ______________________________

I/We authorize S&V Planning Corporation to process a debit, in paper, electronic or other form in the amount of: $___52.45_____ on my/our account on either of the following days of the month:

(choose one) ☐ 5th of each month or ☐ 20th of each month

beginning ______________________________.
date

I/We acknowledge that I/we have read, understood and accepted all the provisions contained in the Terms and Conditions of the Pre-Authorized Payment Authorization and that I/we have received a copy.

Personal PAD Only

______________________________ Date: ____________________
Signature of Payor(s)

Business PAD Only

____
Name(s) of Authorized Signing Officer(s)

______________________________ Date: ____________________
Signature(s) of Authorized Signing Officer(s)

______________________________ Date: ____________________
Signature(s) of Authorized Signing Officer(s)

ATTACH VOID CHEQUE