

Advisor Information for Clients of

Boyd F. Dixon
BA, CSA

About me

I am licensed for life, disability, critical illness insurance, individual and group health benefit plans in New Brunswick and Nova Scotia. I am also licensed to sell segregated funds (RRSP's, RRIF's, and non-registered investments) as well as guaranteed investment products, single premium immediate annuities and group pension plans in these Provinces. I have my designation as a Certified Senior Advisor.

Companies' products made available

I have access to the following companies' products and choose to place business accordingly.

Great-West Life Assurance Company – insurance; individual health; group life/health; investments; group pensions
Manulife Investments – insurance; investments; group life/health
Wawanesa Life – insurance
Transamerica Life Canada – insurance
Assumption Life Assurance Company – group life/health
Industrial Alliance Insurance and Financial Services – group life/health; group pension
Medavie Blue Cross – insurance; individual health

In addition, I offer certain banking products from Solutions Banking (National Bank) through Great-West Life. I refer mortgage needs to a mortgage specialist with London Life.

Nature of relationship with companies

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

Compensation

The company that offers the product you choose will pay me. I am compensated by a sales commission for most products at the time of sale, and may receive a renewal (or service) commission. For certain products, I may receive a referral fee. In respect of certain products, the commission may be different than the standard commission scale provided by the company providing the product. I will advise you if this occurs. Any future increases in the commission scale will require your written approval. I may also be eligible for additional compensation, such as bonuses and non-monetary benefits, such as travel incentives and may be entitled to participate in a share purchase plan. This compensation depends on various factors such as the volume or retention of business 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 of which I become aware in regards to my services. My services will take into consideration your financial needs.

This statement has been prepared by Boyd F. Dixon and Boyd F. Dixon alone is responsible for its accuracy.

Acknowledgment

I, _____ have been informed of, and understand the implications of, this disclosure including any conflict of interest or potential conflict of interest associated with Boyd F. Dixon in relation to any recommendations made.

I agree to continue discussions with you and understand that I may ask for further information regarding this disclosure.

Client Signature: _____ Date: _____