



Communications Preference

I grant REW Financial and its Subsidiaries permission to contact me in the following manner for items pertaining to my contracted Financial Planning Services:

(Please initial and complete all that apply)

Personal

Business

___ Phone:	_____	___ Phone:	_____
___ Email:	_____	___ Email:	_____
___ Mail:	_____	___ Mail:	_____
	_____		_____

I grant REW Financial and its Subsidiaries permission to contact me in the above manner for the following additional reasons:*(Please initial all that apply)*

___ Newsletters	___ Educational Articles	___ Educational Events
___ Seminar Invitations	___ Client Appreciation Events	___ Urgent Office Updates
___ Other Reasons		

Client Name _____

Client Signature _____ Date _____

We value your privacy above everything. We never sell your information for any reason. We pledge to not abuse our privilege of contacting you.

Please see the United Planners Privacy Policy given to you for full details.

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