



Privacy Policy & Client Consent to Release Information

Motiv8 Investments, LLC considers the protection of personal information to be a foundation of customers trust and a sound business practice. We employ physical, electronic and procedural controls in order to protect client confidentiality. We may use personal information about you to assist us in completing your financial plan, completing transaction or account changes, and to maintain or service your account. At Motiv8 Investments we will always restrict access to personal information to those who require it to provide products or services to you. The only time we will provide any information about you or your financial information is with your express, written consent as required by law.

As a full service investment advisor, when appropriate, Motiv8 works closely with The Terrio Group, to help our clients maximize all opportunities available to them to improve their position relative to future and current financial wellbeing. The Terrio Group will recommend suitable insurance products to clients based on information provided by Motiv8. With your permission, Motiv8 may share information with The Terrio Group for this purpose.

Yes No

We may share your personal information and financial plan prepared by Motiv8 with The Terrio Group for the purpose of reviewing your position for specific insurance products.

Client Name

Client Name

Client Signature & Date

Client Signature & Date

Motiv8 Investments, LLC

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