



Date: _____

Notice of confidentiality and Non-disclosure

All written and verbal information provided to *MoneySmartsUSA* and its staff will be managed as confidential. Furthermore, *MoneySmartsUSA* will not disclose any of the client's confidential information to third parties for any reason, without the client's consent. The sole use of the client's confidential information will be for the exclusive purpose of Financial Fitness Training, by *MoneySmartsUSA*, Inc.

Please return this form along with the requested information below. Include with it, the Financial Snap Shot Sheet and the Personal Finance Foundations Form.

Name: _____

Circle Age range: 23-29 30-35 36-40 41-45 46-50 51-55 56-60 60 or better

Circle Gender: Male Female

Annual Income Range: Less than \$20K \$25K – \$60K \$60K- \$85K \$85K – \$160K Over \$160K

Circle marital status: Married Not Married

Circle education: High School Trade School Some College College graduate Master's
Doctorate

Darrell Evans, B.A.

*Chief Financial Fitness Trainer
& Certified Credit Counselor*

Client's Signature

Date: _____

