

**PERSONAL ADVISORY GROUP (PAG)  
PARTICIPATION AGREEMENT  
INDIVIDUAL DECLARATION**

All members of a Personal Advisory Group must understand and agree to the following requirements in order to participate in a PAG.

**1. Confidentiality:**

I, \_\_\_\_\_ understand and acknowledge that in order for my PAG to work, I must feel comfortable sharing openly and honestly. I understand and agree that I will not share anything that is discussed during the PAG meetings with anyone other than my PAG members. This includes but is not limited to significant others, spouses, family members, Chapter Managers, Committee Members, etc. I agree that I will not discuss specific information introduced by another PAG member unless the entire PAG is present, or at a minimum, the original PAG member who began the discussion is in attendance.

Level Two Confidentiality: This level of confidentiality can be invoked by a PAG member sharing highly confidential or sensitive information. If this level of confidentiality is invoked, PAG members cannot discuss the topic raised unless the individual who invoked it is present and agrees to discuss it further. If a member elicits Level Two Confidentiality, I understand and agree that I will not discuss the topic presented under any circumstances unless the individual who invoked it chooses to address it further.

I understand and agree that if anyone in my PAG has a public company or sits on the board of a public company where they may be privy to insider information and may need to share this information during a meeting, that it is illegal for anyone to trade stock based on the information shared.

**2. Participation:**

I, \_\_\_\_\_ agree that I will make my PAG meetings a priority and will put in every effort to participate physically at each meeting. I understand that my fellow PAG members are exerting the same effort as I as to ensure our PAG members feel trust and connection with one another.

I understand that participation in a PAG is a privilege to only members of Family Enterprise Xchange, and that membership to belong to this association and my PAG comes with an annual renewal fee. I agree that if I choose to no longer belong to FEX, that I will also resign my position within my PAG.

**3. Non-Solicitation Policy**

I, \_\_\_\_\_ agree and understand that like all FEX events and activities, I will not use my PAG to solicit clients or customers. FEX provides a 'safe harbour' environment free of sponsorship and solicitation and this includes my interactions within the PAG meetings.

As a PAG Member, I will not exchange business leads or referrals, but instead will provide positive feedback and ongoing support to the other members in my group for both their business and personal issues and opportunities.



I understand the moral and ethical responsibility that the members of my PAG have entrusted in me with their most personal feelings, thoughts and situations. To break this trust will destroy the dynamics of my PAG.

I agree to the above terms.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_ (initials for electronic signature)

Date: \_\_\_\_\_

City: \_\_\_\_\_

**Once completed, please provide the signed copy to your Chapter Manager prior to your first meeting with your new PAG. This can be sent as a hard copy, electronic copy or scanned and emailed to the Chapter Manager. This agreement must be acknowledged and signed prior to attending the first meeting with your PAG.**

