

Client Name:

I refer to the results of my Client Suitability Assessment (“CSA”) (the “Results”) conducted by the authorized personnel of BPI Wealth – A Trust Corporation (“BPI Wealth”). In relation thereto, I wish to inform BPI Wealth that I do not agree with or accept the Results and consequently, the corresponding recommendation of BPI Wealth on the investment product or portfolio appropriate to my risk profile. I would like to avail of the investment product or portfolio other than that which is consistent with the Results and the recommendation of BPI Wealth. I am therefore requesting from BPI Wealth for a general reclassification of my existing risk profile, and hereby waive the Results.

As a consequence thereof, I am fully aware, have fully understood, and agreed to take on the additional investment risks. I understand that I am taking more risks in exchange for possible higher returns directly attributed or incidental to the additional investment products or portfolio, which are inconsistent with the Results. I expressly agree to assume such higher or additional risks and exclusively bear the consequence of my conscious decision and action to invest in said additional products or investments with higher or additional risks. Moreover, I fully understand that this waiver effectively supersedes any objective methodology established by the CSA process that I have undertaken with BPI Wealth.




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Signature over Printed Name

**PERSONNEL ACKNOWLEDGEMENT**

Date:	Signature Verified By:  Signature over Printed Name of Certified Marketing Personnel	Checked/Approved By:  Signature over Printed Name of Certified Marketing Personnel (Officer)
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Customer Number(s): \_\_\_\_\_