

This form must be signed and returned to info@kinderinstitute.com prior to the start of the program.

Prior to and During the Course:

For all courses (in-person and online):

- Privacy is a key aspect of this program. You agree to not record, video or audio, and/or share any of the material within the program.
- You must be fully available during the whole training period (8-9 hours) each day. Interruptions are not allowed, except for lunch and occasional breaks that will be announced by the trainers. It's important to respect these parameters to ensure the integrity of the program.

For online courses:

- You must set up your meeting space to ensure privacy and with as little background noise as possible. During the training, you agree that no one else but you will see or hear the video or audio of this training.
- This online training will take place on a video conference platform. You will receive instructions on the Zoom and WhatsApp features. Please familiarize yourself with it and test the technical aspects of your set-up prior to the start – especially the quality of your camera, microphone, and the stability of your internet. It's important to be in a comfortable place, with good lighting, and using a proper screen, ideally with two monitors (not a smart phone or iPad.)

Upon Completion of the Course:

Kinder Institute of Life Planning supports your use of the life planning exercises and concepts according to the following guidelines:

1. For Private Client Use:

- Graduates may use the life planning exercises (Three Questions, Heart's Core Grid, Ideal Day/Week/Year, and Goals for Your Life) henceforth referred to as "copyrighted materials" with individual clients or in client group meetings. The attribution below should appear at the bottom of any page or slide that includes the copyrighted materials.¹
- You may give client presentations of up to two hours. Presentations that exceed two hours require permission from Kinder Institute of Life Planning; in most cases permission will be granted.
- Copyrighted materials cannot be given to or used to train other advisors.
- Copyrighted materials can only be used by advisors who have taken The Seven Stages of Money Maturity® and/or EVOKE® Life Planning Training through Kinder Institute of Life Planning.
- Copyrighted materials may not be used as part of a website or online database.

¹ In all instances where Kinder Institute of Life Planning copyrighted materials are used, they must be acknowledged verbally with the following permission statement: "Materials were developed by George Kinder and Kinder Institute of Life Planning and are part of a program of trainings that lead to the Registered Life Planner® designation." Any handouts must include the permission statement as well as the copyright notice: "Used by permission of George Kinder © 1999-2023."

2. For Presentations to Groups, Public or Non-Profit:

- You have permission to make pro-bono (unpaid) presentations of up to two hours. If presentations will be more than two hours but not exceeding four hours, please contact Kinder Institute and let us know the details; in most cases permission will be granted.
- If the copyrighted materials are going to be used in a speech or for the public, you must request permission from Kinder Institute. The Institute typically grants such requests. The attribution below should appear at the bottom of any page or slide that includes the copyrighted materials.
- All concepts and materials must be verbally attributed to Kinder Institute of Life Planning.

3. For Presentations within the Financial Services Industry and/or to corporate entities, contact Kinder Institute of Life Planning for permission to use the materials as follows:

- For unpaid presentations of less than four hours, a license agreement may be required, and verbal attribution of Kinder Institute of Life Planning's concepts is required. Please consult with Kinder Institute of Life Planning.
- For paid presentations of less than four hours, compensation to Kinder Institute of Life Planning may be required. A license for the use of Kinder Institute of Life Planning's materials and concepts will be granted on a case-by-case basis.
- Other than The Seven Stages of Money Maturity® Training, which has separate certification requirements, Kinder Institute of Life Planning does not generally give permission to use Kinder Institute's copyrighted materials in workshops or workshop series of longer than four hours.

Print Participant Name

Signature

Date