



OF ORANGE COUNTY

Pro Bono Participant Engagement Agreement

The objective of the Financial Planning Association of Orange County (FPAOC) pro bono education and one-on-one financial planning offerings is to deliver free financial planning information, education, and limited scope advice to the public. FPAOC does not recommend or endorse individual professionals or services.

Participants understand that the professionals engaged in delivering education and advice through this service have volunteered to provide free general financial planning information, and specific limited scope financial planning advice. Any information, conversations, or recommendations participants may receive through this service are for informational purposes only, and reliance on such is solely at their own risk. No client, representative or agent relationship is created by participation in and taking advantage of this service.

The professionals engaged in this service will not offer or promote the use of specific services or products, especially those of their own firms, and will not solicit you participants to become clients of their firms.

By registering for FPAOC pro bono offerings, participants expressly agree to hold all individuals and parties associated with the services harmless regarding any action they may ultimately decide to take in connection with the information, conversations, or recommendations they may receive.