

**Lee Financial Corporation  
Collaborative  
User Agreement**

This Agreement sets out the terms of your use of the Lee Financial Corporation (“LFC”) Collaborative User Site (“Site”) which provides you access to certain information for your client.

**Condition of Use.** Only authorized advisors of LFC clients are permitted to use this Site.

**Term.** This Agreement will remain in full force and effect while you use the Site. You may terminate the Site at any time, for any reason, by giving LFC your written or email notice of termination. LFC may discontinue the Site for any reason effective upon sending you notice of termination.

**Proprietary Rights in the Site.** LFC owns and retains all proprietary rights in the Site. The Site contains the copyrighted material, trademarks, and other proprietary information of LFC, and its licensors. You may not copy, modify, publish, transmit, distribute, perform, display, or sell any such proprietary information.

**Password Use.** You understand and agree that access to your client’s personal information on the Site is password protected. LFC will not disclose your password to anyone other than you.

**Privacy.** Use of the Site is governed by the LFC Privacy Policy which is attached as Appendix I.

**Disclaimers.** LFC is not responsible for any incomplete, incorrect or inaccurate information disclosed in the Site. LFC will periodically update the Site. LFC is not responsible for any out of date information on the Site. LFC is not responsible for equipment failures or of the Site or by any of the equipment or programming errors associated with or utilized in the Site.

**Advisors.** Your use of the materials on the Site is your responsibility. LFC is not responsible for the conduct of any user of the Site.

**SUPPLEMENTAL INFORMATION.** YOU MAY SUPPLEMENT THE SITE BY PROVIDING ADDITIONAL INFORMATION SUCH AS TAX RETURNS THROUGH A LINK IN THE SITE THAT PERMITS ADDITIONAL INFORMATION TO BE ADDED.

**LIMITATION OF LIABILITY.** YOU UNDERSTAND LFC WILL NOT BE LIABLE FOR ANY DIRECT CONSEQUENTIAL, EXEMPLARY OR PUNITIVE DAMAGES ARISING FROM YOUR USE OF THE SITE.

**INDEMNITY.** YOU AGREE TO INDEMNIFY AND HOLD LFC, ITS OFFICERS AND EMPLOYEES, HARMLESS FROM ANY LOSS, LIABILITY, CLAIM OR DEMAND, INCLUDING REASONABLE ATTORNEY'S FEES, ARISING OUT OF THE SITE OR YOUR USE OF THE SITE.

I HAVE READ THIS AGREEMENT AND AGREE AND CONSENT TO ALL OF THE PROVISIONS CONTAINED ABOVE.

EXECUTED ON \_\_\_\_\_.

\_\_\_\_\_  
CLIENT

\_\_\_\_\_  
E-Mail Address

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