Fleischner Consulting

CLIENT DISCLOSURE & ACKNOWLEDGMENT FORM

Client Name: ______________________________
Email: ___________________________________
Phone: __________________________________

1. Nature of Services
I understand that Fleischner Consulting provides general financial education, retirement readiness coaching, and personal finance consulting services. Services are non-fiduciary, non-investment advisory, and educational in nature.

2. No Investment Advice or Asset Management
I understand that:

- No specific investment recommendations are being made to me.
- Fleischner Consulting does not manage client assets or investment accounts.
- Any examples or illustrations are for educational purposes only and are not personalized investment advice.

3. No Tax or Legal Advice
I understand that Fleischner Consulting does not provide tax, legal, or accounting advice. I am encouraged to consult with a qualified tax professional, attorney, or other advisor regarding my specific situation.

4. Personal Responsibility
I understand that I am responsible for my own financial decisions. Any actions I take based on the information or education provided are my own choice and at my own risk.

5. Confidentiality
Information I share with Fleischner Consulting will be kept confidential, except as required by law or with my written consent.

6. Acknowledgment
By signing below, I acknowledge that I have read, understand, and agree to the statements above.

Client Signature: _____________________________
Date: ________________