

Abacus Pro Bono Financial Check-up Participant Agreement

The objective of the Pro bono Financial Check-up at Abacus Wealth Partners (Event) is to deliver free financial planning information and education to the public. One-on-one meetings with a planner are for educational purposes only.

The professionals at the Event have volunteered to provide free general financial planning information. Any information, conversations or recommendations I may receive at the Event are for informational purposes only, and reliance on such is solely at my own risk. No client representative or agent relationship is created by my participation in the Event.

By accepting this information without paying any costs or fees, I expressly agree to hold all individuals and parties associated with the Event harmless regarding any action I may ultimately decide to take in connection with the information, conversations, or recommendations I may receive.

I agree to release the volunteers and Abacus Wealth Partners of any and all claims, actions, suits, proceedings, damages, liability, costs and expenses incurred as a result of any act or failure as a result of negligence or unauthorized actions in connection with activities at the Event.