

Transition Guide

When you become an Agent of *yourCFO*, head office staff will assist your transition. This normally lasts two to three months, and during this period you'll receive assistance with documents and procedures, training on back-office programs, answering procedural questions, and Agent Access.

As outlined in detail in the Agent Commercial Agreement, *yourCFO*'s head office will provide compliance and supervisory services to its Agents. As an entrepreneur, you will run your business, provide your support staff, and train any new staff. You and/or your staff will be responsible for running the day-to-day aspects of your business, and resolving operational issues with the various third party suppliers, such as TD Waterhouse.

Recognizing there's always room for improvement and change, we would appreciate you relaying to head office any improvements that pertain to *yourCFO* or any of our third party suppliers.

We will act as your advocate to continually improve the overall services.