

This form must be signed and returned to [info@kinderinstitute.com](mailto:info@kinderinstitute.com) prior to the start of the program.

**Prior to and During the Course:**

- The mentorship program is comprised of multiple components (group training sessions, coaching calls, posting of case studies, and posting of responses to case studies). Timely participation is central to all Mentees' learning and requires strict adherence to deadlines set forth in a schedule provided by the trainers at the start of the program.
- Mentee agrees to abide by all the program requirements, including adherence to all timeframes. These requirements include, but are not limited to the following:
  - Participation in a kick-off meeting and all subsequent group meetings and training sessions (known as Comeback Days).
  - Submission of written draft case study presentation(s) to Mentor for preview and feedback at least one week prior to scheduled posting date listed on the training schedule.
  - Posting of finalized case study presentation(s) on mentorship forum following the training schedule and sending a concurrent email notification to group members.
  - Posting of case commentary responses to case study presentations following the training schedule.
  - Scheduling and participating in monthly 1:1 coaching call with Mentor.
  - Completion of Mentorship Evaluation within one week of receipt.
- Mentee agrees that should a circumstance arise which prevents them from meeting a timeframe outlined in the training schedule, it is their responsibility to notify one of the Mentors in advance and arrange a mutually agreeable extension. Mentee agrees that should they wish to swap the timing of their case study presentation, they will make that arrangement directly with their peers and notify the trainers of the change to the schedule.
- Mentee must be fully available during Comeback Days (8 hours each). Interruptions are not allowed, except for lunch and occasional breaks that will be announced by the trainers. It's important to respect these parameters to ensure the integrity of the program.
- Privacy is a key aspect of this program. You must set up your meeting space during group calls and Comeback Days to ensure privacy and with as little background noise as possible. During these sessions, you agree that no one else but you will see or hear the video or audio of this training. You also agree to not record, video or audio, and/or share any of the material within the program.
- This online training takes place over the course of six months using a forum posting site and video conference platform. If needed, you will receive instructions on the Zoom and WhatsApp features for video sessions and how to use the mentorship forum to post case studies and responses. Please familiarize yourself with these tools and test the technical aspects of your set-up prior to the start of any video sessions or forum usage.

**Upon Completion of the Course:**

Kinder Institute of Life Planning supports your use of the life planning exercises and concepts according to the following guidelines:

**1. For Private Client Use:**

- Graduates may use the life planning exercises (Three Questions, Heart's Core Grid, Ideal Day/Week/Year, and Goals for Your Life) henceforth referred to as "copyrighted materials" with individual clients or in client group

meetings. The attribution below should appear at the bottom of any page or slide that includes the copyrighted materials.<sup>1</sup>

- You may give client presentations of up to two hours. Presentations that exceed two hours require permission from Kinder Institute of Life Planning; in most cases permission will be granted.
- Copyrighted materials cannot be given to or used to train other advisors.
- Copyrighted materials can only be used by advisors who have taken The Seven Stages of Money Maturity® and/or EVOKE® Life Planning Training through Kinder Institute of Life Planning.
- Copyrighted materials may not be used as part of a website or online database.

**2. For Presentations to Groups, Public or Non-Profit:**

- You have permission to make pro-bono (unpaid) presentations of up to two hours. If presentations will be more than two hours but not exceeding four hours, please contact Kinder Institute and let us know the details; in most cases permission will be granted.
- If the copyrighted materials are going to be used in a speech or for the public, you must request permission from Kinder Institute. The Institute typically grants such requests. The attribution below should appear at the bottom of any page or slide that includes the copyrighted materials.
- All concepts and materials must be verbally attributed to Kinder Institute of Life Planning.

**3. For Presentations within the Financial Services Industry and/or to corporate entities, contact Kinder Institute of Life Planning for permission to use the materials as follows:**

- For unpaid presentations of less than four hours, a license agreement may be required, and verbal attribution of Kinder Institute of Life Planning's concepts is required. Please consult with Kinder Institute of Life Planning.
- For paid presentations of less than four hours, compensation to Kinder Institute of Life Planning may be required. A license for the use of Kinder Institute of Life Planning's materials and concepts will be granted on a case-by-case basis.
- Other than The Seven Stages of Money Maturity® Training, which has separate certification requirements, Kinder Institute of Life Planning does not generally give permission to use Kinder Institute materials or copyrighted expression in workshops or workshop series of longer than four hours.

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Print Participant Name

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Signature

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Date

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<sup>1</sup> In all instances where Kinder Institute of Life Planning copyrighted materials are used, they must be acknowledged verbally with the following permission statement: "Materials were developed by George Kinder and Kinder Institute of Life Planning and are part of a program of trainings that lead to the Registered Life Planner® designation." Any handouts must include the permission statement as well as the copyright notice: "Used by permission of George Kinder © 1999-2023."