Client Pledge

Objectivity: We strive to be as unbiased as possible in providing advice to clients and practice on a fee-only basis.

Confidentiality: We shall keep all client data private unless authorization is received from the client to share it. We shall treat all documents with care and take care when disposing of them. Relations with clients shall be kept private.

Competence: We shall strive to maintain a high level of knowledge and ability. We shall attain continuing education at least at the minimum level required. We shall not provide advice in areas where we are not capable.

Fairness & Suitability: Dealings and recommendation with clients will always be in the client's best interests. We put our clients first.

Integrity & Honesty: We will endeavor to always take the high road and to be ever mindful of the potential for misunderstanding that can accrue in normal human interactions. We will be diligent to keep actions and reactions so far above board that a client, or other professional, would not doubt intentions. In all actions, we should be mindful that in addition to serving our clients, we are about the business of building a profession and our actions should reflect this.

Regulatory Compliance: We will strive to maintain conformity with legal regulations.

Full Disclosure: We shall fully describe method of compensation and potential conflicts of interest to clients and also specify the total cost of investments.

Professionalism: We shall conduct ourselves in a professional manner at all times. We shall maintain the values of integrity, honest treatment of clients, and treating people with respect.