

PLEDGE TO CLIENTS

As an ACA member, in all my dealings with my clients, I pledge to be:

HOLISTIC in outlook. I will consider all of your circumstances, family needs, goals, values, and aspirations when making recommendations.

PROFESSIONAL in conduct. I will protect your privacy. I will strive to maintain the highest ethical standards possible in my work and life. I will continually enhance my skills and credentials through continuing education and I will refer you to other professionals when you need help in an area outside my expertise.

EDUCATIONAL in nature. I will guide you through your options and explain them clearly to help you make the best choices. I will always take the time to make sure you understand my advice.

INDEPENDENT in compensation. I will never sell you a product or service other than holistic financial planning nor will I take a commission or a referral fee from another professional. You will receive objective, unbiased advice from me.

COMMITTED to your success. Holistic financial planning is a process, not an event, and I commit to adjusting your plan as your life goals change.

