



PLEDGE TO CLIENTS

As ACP members, in dealing with our clients, we pledge to be:

HOLISTIC in outlook. We will consider everything we know about your relevant circumstances, family needs, goals, values, and aspirations when making comprehensive planning recommendations.

PROFESSIONAL in conduct. We will strive to maintain the highest ethical standards possible in our work and life. We will enhance our skills and credentials through ongoing continuing education, and we will refer you to other professionals when you need help in an area outside our expertise.

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

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

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