

True **Fiduciary**[®] Standards

01

Embrace the Legal
Fiduciary Obligation
to Place Clients'
Interests First

02

Deliver
Comprehensive
Financial Planning

03

Provide
Fee-Only
Advice

04

Do Not
Accept
Commissions

In
Your
Best
Interest

05

Receive Only One
Source of Revenue:
Client Fees

06

Provide
Transparency on
Portfolios and
Investments

07

Remain Independent
from any Bank,
Broker Dealer,
Insurance or Custodian

08

Measure Client
Performance Returns
Using Independent
Third Parties

09

Do Not Create
Products to Sell or
Price Any Public
Securities

10

Do Not Hold
Any Client Assets,
Securities or
Money

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