

Keys to a successful relationship

We provide comprehensive investment planning. If we develop a successful working relationship, we will work together to help achieve your goals.

What you can expect from us

You can trust that we will responsibly perform all requested services.

We will:

- Treat you with respect, honesty and dignity
- Act as your advisor, putting your interests first
- Strive to acquire a complete and accurate understanding of your goals, your tolerance for investment risk and your time frame
- Explain the implications of the strategies we propose
- Update you by email, mail and phone
- Be prompt and prepared for our meetings
- Meet with you to review your investment planning needs
- Respect your confidential information

What we can expect from you

Effective communication and mutual respect are essential to a successful relationship, so we expect:

- Trust
- Honesty and full disclosure
- Respect
- Responsiveness to requests
- Sincerity
- Commitment to our process

We expect you to understand that our recommendations are always based on your best interests. As our client, you need to know that all investment advice will be based on the information you provide to us. We expect you to be fully engaged in the investment planning process.

Mutual responsibilities

We believe working together is essential to effective investment planning. To this end, we both need to make your investment strategies a priority. We will agree to:

- Keep each other informed of any new developments that might affect these strategies.
- Meet to review your investment plan and be prompt and prepared for those meetings

Together, we can build an effective, long-term working relationship

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