

Fiduciary Standard



Our Relationship with You

Our relationships with our clients are like the relationship between a doctor and her patient, or between a lawyer and his client. As fiduciaries, we are obligated to act in your best interests, we are bound by legal duties of loyalty and care, and your financial matters must remain confidential.

We are fiduciaries, and must adhere to a Fiduciary Standard

The highest standard in the financial services industry. We have a legal obligation not to subordinate clients' interests to our own. We act in your best interest and must set aside personal motives and avoid conflicts of interest, in favor of pursuing the best solution to your unique situation. Included in the fiduciary standard are the duties of loyalty and care - for our clients' only.



As an AIF® Designee, We are Dedicated to Using our Knowledge to:

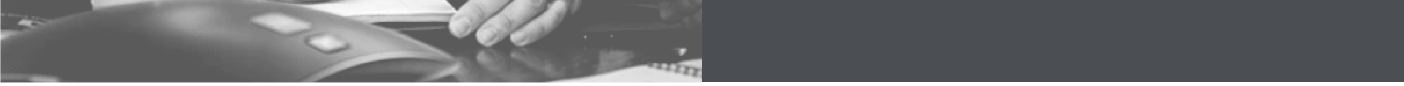
Employ uniform, industry-recognized processes for developing a personalized investment strategy based solely on our clients' specific investment needs.

Apply objective, comprehensive standards for evaluating and recommending investment options for our clients' portfolios.

Monitor and report performance of our clients' portfolios and their underlying investments on an ongoing basis, and recommend changes when necessary.

Conduct ongoing reviews of our business practices to ensure fiduciary principles are being properly applied.





Learn More About Our Role As A Fiduciary



Fiduciary Standard

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