



Authentic 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

05

Be Transparent on
Client Costs, Fees,
and Terms

06

Provide
Transparency on
Portfolios and
Investments

In
Your
Best
Interest

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 Physically Hold
or Possess Any Client
Assets, Securities,
or Money



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