

ACP Canon of Ethics

As an ACP member, I agree to the following Canon of Ethics and will uphold it in my dealings with clients, fellow members, and Alliance of Comprehensive Planners, Inc.:

I am in a fiduciary relationship with clients, which means I will put each client's interests first, before my interests or any others, and disclose potential conflicts of interest to all clients and prospective clients.

I will conscientiously complete all work agreed to in a prompt and timely manner.

I will provide financial planning services solely as a fee-only advisor. I will act objectively in all matters with clients and will not accept any commissions based on advice or recommendations given.

I will continually strive to improve upon the competence and the quality of services I provide.

I will maintain the highest level of professional integrity in relationships with clients, associated professionals, and government officials.

To the extent allowed by law, I will always hold confidential all information shared with me by potential and contractual clients and by other members and staff of ACP.