

The ACP Pledge to Clients

As an ACP member, in all my dealings with my clients, I pledge to be:

Holistic in outlook.

I will consider everything I know about your relevant circumstances, family needs, goals, values, and aspirations when making comprehensive planning recommendations.

Professional in conduct.

I will strive to maintain the highest ethical standards possible in my work and life. I will enhance my skills and credentials through ongoing continuing education, and I will refer you to other professionals when you need help in an area outside my expertise.

Educational in nature.

I will guide you through your options and explain them clearly to help you make the best choices. I will always take the time to help you understand my advice.

Independent in compensation.

I will never sell you a product other than holistic financial planning, nor will I take a commission or a referral fee from another professional. You will receive objective, unbiased advice from me.

Committed to your success.

Holistic financial planning is a process, not an event, and I commit to adjusting your plan as your life goals and circumstances change.