



Client Bill of Rights

I expect my adviser to really understand me and help me live my best financial life.

I expect my adviser to help me make smart financial choices.

I want my adviser to tell me the truth and be completely on my side.

I want my adviser to have good judgment and be able to find answers to my challenges

I want my adviser to bring me understanding and help me feel in control.

I expect my adviser to provide proactive communication and keep me informed of any events that might impact my family's finances.

I want my adviser to care.

I expect my adviser to help me organize and keep up-to-date all of my important financial documents.

I want my adviser to be worth what I pay him.

I expect my adviser to help simplify my life.