Balanced Financial Concepts

Advisor Bill of Rights

We expect our clients to be truthful and honest when it comes to their finances.

We expect our clients to consider our recommendations seriously and make educated decisions.

We expect clients to honor the two-way line of communication and return calls and emails promptly.

We want our clients to see us as more than just their financial adviser.

We expect clients to send us information promptly when requested.

We deserve to be paid for our time and services, and it is our duty to ensure clients receive much more value than what they pay in fees.

We want clients to use us as a resource when it comes to their financial affairs and questions.

We want clients to inform us of areas where we can elevate their experience.

We aim to earn referrals and introductions from clients without asking.

We expect clients to take their finances and their future seriously.