

Standard of Care

FPA Standard of Care

All financial planning services will be delivered in accordance with the following standard of care:

Principle 1

Put the client's best interests first.

Principle 2

Act with due care and in utmost good faith.

Principle 3

Do not mislead clients.

Principle 4

Provide full and fair disclosure of all material facts.

Principle 5

Disclose and fairly manage all material conflicts of interest.