

# True Fiduciary® Standards

**01**

Embrace the Legal  
Fiduciary Obligation  
to Place Clients'  
Interests First

**02**

Deliver  
Comprehensive  
Financial Planning

**03**

Provide  
Fee-Only  
Advice

**04**

Do Not  
Accept  
Commissions

**06**

Provide  
Transparency  
on Portfolios  
and Investments

In  
**Your**  
Best  
Interest

**05**

Be Transparent on  
Client Costs, Fees,  
and Terms

**07**

Remain Independent  
from any Bank, Broker  
Dealer, Insurance  
or Custodian

**08**

Measure Client  
Performance Returns  
Using Independent  
Third Parties

**09**

Do Not Create  
Products to Sell or  
Price Any Public  
Securities

**10**

Do Not Physically  
Hold or Possess Any  
Client Assets,  
Securities, or Money



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