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Putting My Clients' Interests First

I believe in placing my clients' best interests first. Therefore, I am proud to commit to the following five fiduciary principles:

1. I will always put my clients' best interests first.
2. I will act with prudence; that is with the skill, care, diligence, and good judgment of a professional.
3. I will not mislead clients, and I will provide conspicuous, full and fair disclosure of all important facts.
4. I will avoid conflicts of interest.
5. I will fully disclose and fairly manage, in my clients' favor, any unavoidable conflicts.

Do you know exactly how much money it is going to take for you to retire comfortably **and to remain comfortably retired?**