Fiduciary Oath

Putting Your Interests First

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

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

Why this Matters: The financial services industry includes many professionals who operate under different standards. While some are required to put clients' interests first at all times, working with professionals who sell financial products or receive commissions can introduce conflicts of interest that make decisions more difficult to navigate. These differences aren't always clear to consumers, leading to confusion and misconceptions about how advice is provided.

We uphold the fiduciary standard in all client relationships and commit to delivering professional advice with transparent fees. As a fiduciary and fee-only investment adviser, our advice is provided without any commissions or sales incentives from third parties ensuring that our commitment is always to you, the client.