

The 7 Standards™

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WHAT KNOWLEDGEABLE INVESTORS AND FIDUCIARIES DEMAND:

- I. Objective investment strategies and advice from an independent organization with no inherent conflicts of interest to sell proprietary securities or insurance products.
- II. Broadly diversified portfolios developed specifically for their needs utilizing Modern Portfolio Theory and a Strategic Asset Allocation process.
- III. Disciplined, practical, and systematic approach which organizes and coordinates resources and establishes appropriate levels of risk and return expectations.
- IV. Timely and accurate reporting of assets and performance; measuring results against established benchmarks and goals.
- V. Benefit from the same investment disciplines utilized by some of the largest corporations, institutions, and retirement funds.
- VI. Advisors with the highest level of qualifications, experience, and competence who adhere to a strict published code of ethics, and have a commitment to diligently pursue continuing professional education.
- VII. Long-term advisor relationships built on the highest levels of professionalism, integrity, and trust.

If you have questions about this or other planning issues, please give us a call at 216-765-0121.