

OUR FIDUCIARY PLEDGE

At Stanley Wealth Partners, we are committed to upholding the highest standards of fiduciary duty in serving our clients. As such, we pledge to adhere to the following principles and responsibilities:

1. Client's Best Interests:

We will always act in the best interests of our clients and place their interests ahead of our own or any other conflicting interests. Our recommendations and actions will be guided solely by what is most advantageous and suitable for our clients' financial well-being.

2. Duty of Care:

We will exercise due care, skill, and diligence in providing financial advice and managing our clients' assets. We will strive to maintain a deep understanding of the financial markets, products, and strategies to ensure our advice is accurate, informed, and based on the most current information available.

3. Transparency and Disclosure:

We will provide full and transparent disclosure of all relevant information to our clients, enabling them to make informed decisions about their financial affairs. This includes disclosing all material facts, real and perceived conflicts of interest, compensation structures, fees, and any other relevant information that may impact our clients' decision-making process.

4. Confidentiality and Privacy:

We will maintain the utmost confidentiality and privacy regarding our clients' personal and financial information. We will handle all client information with the highest level of security and only share it when necessary, with the client's explicit consent or as required by law.

5. Professionalism and Integrity:

We will conduct ourselves with the highest level of professionalism, honesty, and integrity in all our interactions with clients, colleagues, and the broader financial community. We will always strive to build trust through open communication, ethical behavior, and sound business practices.

6. Ongoing Education and Improvement:

We will continually enhance our knowledge and skills through ongoing education, professional development, and staying abreast of industry developments. This commitment to continuous improvement ensures we provide the most up-to-date and effective advice to our clients.

7. Compliance with Applicable Laws and Regulations:

We will comply with all applicable laws, regulations, and industry standards governing our profession. We will maintain the necessary licenses, registrations, and qualifications to provide financial services, and we will remain aware of any changes or updates to these requirements.