

## **FPA Standard of Care**

Whereas the public expects to experience a high level of confidence, trust and clarity in relationships with professionals trained in the distinct process and discipline of financial planning, it is essential that they obtain a commitment of professional care, quality and excellence in the services they receive.

All financial planning services will be delivered in accordance with the following standard of care:

- Put the client's best interests first;
- Act with due care and in utmost good faith;
- Do not mislead clients;
- Provide full and fair disclosure of all material facts; and
- Disclose and fairly manage all material conflicts of interest.