

**B**ona Fide Finance follows the Code of Ethics established by the Certified Financial® Planner Board. These principles express our responsibility to the public, clients, and colleagues.

**INTEGRITY** Integrity demands honesty and candor which must not be subordinated to personal gain and advantage. We commit ourselves to pursuing truthfulness and transparency. We will strive to keep your wellbeing as our central focus.

**OBJECTIVITY** Objectivity requires intellectual honesty and impartiality. We commit ourselves to presenting unbiased guidance. We will work to ensure that every recommendation is in your best interest.

**COMPETENCE** Competence requires that we maintain the necessary knowledge and skill to provide quality advice. We commit ourselves to continuous learning and professional improvement. We also commit to honestly assessing our own limitations and to leverage our relationships with other professionals when their specialized knowledge is needed. Our advice will be offered on the foundation of thorough research and understanding.

**FAIRNESS** Fairness is treating others in the same fashion that you would want to be treated. We commit to full disclosure of any conflicts of interest and we commit to subordinating our agenda to serve you.

**CONFIDENTIALITY** Confidentiality ensures that information is accessible only to those with proper authorization. We commit to maintain your privacy.

**PROFESSIONALISM** Professionalism involves acting in a manner that demonstrates exemplary conduct. We commit ourselves to treating you with dignity and courtesy.

**DILIGENCE** Diligence is the provision of services in a reasonably prompt and thorough manner. We will agree on the frequency of meetings and will be attentive to the progress on your goals.



BONA FIDE  
FINANCE  
FINANCE IN GOOD FAITH