

OUR CORE VALUES & BELIEFS

- The truest road to success lies in helping others succeed, and we are passionate about helping others!
- We hold ourselves to the highest ethical standards.
- We will do what we say we will do, when we say we will do it.
- We will always make recommendations that we believe are in our client's best interest.
- We will always conduct ourselves in such a way as to bring honor to our firm and all those that we are associated.
- We believe that being independent allows us to provide a better level of service to our clients.
- We focus our effort on finding Win/Win relationships—defined as relationships that are profitable, involving people we enjoy working with, who appreciate what we do for them, and where we believe we can have a positive and meaningful impact.
- We believe that a well-thought out financial plan is the master strategy and all key financial decisions should stem from the plan.
- If we make a mistake, we will acknowledge it and then work diligently to correct it as soon as possible.
- We understand that our primary role is to help our clients become good stewards of their net worth.
- We are diligent about continuing our education in any field that will help us provide better advice to our clients.
- We would never recommend that a client take an action that we would not take if we were in the same situation.
- It's important to us that we manage our own personal financial situation in the same way as we advise our clients.
- We understand that risk and return are always related. Further, we believe it is almost always wiser to forego the opportunity to 'make a killing' for the eternal blessing of never getting killed!

IWS

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