

 Our Mission Statement

Our role is to help our clients make informed decisions about their financial future and provide them with a strategy that is consistent with their vision and values.  We take a client centered approach to your wealth management and work diligently to provide an elite level of customer service. Clients come first, that is our promise. You can be assured that we provide an environment of complete independence and uncompromising integrity.

We will:

* Establish a relationship based on mutual trust and a firm understanding of your financial and personal goals and objectives.
* Be a financial coach and collaborator, not just someone who sells you products and services.
* Guide you in decisions and not just make them for you.
* Educate you so you can make suitable and competent financial decisions.
* Establish a long-term “plan-full” relationship, and an investment approach tailor-made for you and not someone else.
* Work with highly effective money managers so you know you are getting proven products and a dynamic care-taking of you investments.
* Offer flexible pricing strategies that give you the freedom of choice.
* Stay updated and educated in the financial services field in order to bring you the most up-to-date and cutting edge strategies available.



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Jake Cook, CFP® and Brent Peroutka, CFP®

Investment Advisor Representative

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Comprehensive Wealth Solutions LLC and Woodbury Financial Services are not affiliated entities. Securities and Investment Advisory Services offered through Woodbury Financial Services, Inc. Member FINRA/SIPC and Registered Investment Advisor.

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 Our Code of Ethics

*Principle 1 – Integrity-* We shall offer and provide professional services with integrity.

*Principle 2 – Objectivity –* We shall be objective in providing professional services to clients.

*Principle 3 – Competence –* We shall provide services to clients competently and maintain the necessary knowledge and skill to continue to do so in those areas in which we are engaged.

*Principle 4 – Fairness –* We shall perform professional services in a manger that is fair and reasonable to clients, principals, partners, and employers and shall disclose conflict(s) of interest(s) in providing such services.

*Principle 5 – Confidentiality –* We shall not disclose any confidential client information without specific consent of the client unless in response to proper legal process, to defend against charges of wrongdoing by us or in connection with a civil dispute between us and client.

*Principle 6 – Professionalism –* Our conduct in all matters shall reflect credit upon the profession.

*Principle 7 – Diligence –* We shall act diligently in providing professional services.