

Client Bill of Rights

At Golden Wealth Solutions our advisors are committed to:

* Ongoing monitoring and regular reviews of your financial plan, accounts, investments, insurance protection, estate and legacy planning
* Communicate complicated financial concepts in simple terms our clients understand
* Acknowledge any errors and correct without delay
* Address all phone calls and electronic communication in a timely and responsible manner
* Receive accurate and timely statements on your accounts, including details of each transaction
* Treat other with respect and integrity at all times
* Strict client confidentiality and privacy
* Full disclosure of fees and risks associated with any recommendations
* Suitable recommendations based on our client’s risk tolerance, time horizon and goals
* Continue and maintain the highest level of education and training to provide our clients with accurate and timely information and recommendations
* Set an example to be a leader in society.

As a client of Golden Wealth Solutions, we ask you to:

* Provide and disclose all pertinent information about your financial status and investment objectives.
* Inform us of any changes in your financial situation and any major life events, such as a new child, job change or loss, marriage or divorce, etc.
* Let us know when we have not met your expectations
* Let us know if you are not comfortable or do not understand any recommendations or information that we discuss
* Read all sales literature and prospectuses provided to you