

**WHY YOU CAN TRUST YOUR NEST EGG  
*with a* FIDUCIARY.**

**7 REASONS  
WHY  
SUCCESSFUL  
INVESTORS  
CHOOSE  
FIDUCIARIES**

# #1

## **INTEGRITY.**

Your FIDUCIARY places your needs and objectives at the forefront of ALL planning decisions.

The financial services industry is plagued with high commission products, company incentives and production contests. Your FIDUCIARY is required by law to provide honest advice based solely on your situation and not to be swayed by outside pressures.

Even the most ethical advisors are faced with the dilemma of balancing recommendations that meet your needs, while also being paid appropriately. If your advisor works for another company, he or she may not have an option to recommend the best product for your situation. Instead he or she may only be able to offer the products of the company they work for.

# #2

## **COMPETENCE.**

Your FIDUCIARY is committed to the highest educational and professional standards.

Your FIDUCIARY must have the education and experience to recommend products and services that meet your specific needs. In addition, your FIDUCIARY leverages Subject Matter Experts, tapping an entire industry of knowledge, not just the offerings of one company, thereby ensuring you receive the best advice and recommendations.

# #3

## **EDUCATION.**

Your FIDUCIARY follows a duty of care.

Your FIDUCIARY cares for you, educating you on the different aspects of your financial plan and ensuring your understanding of how all the pieces fit together to create a sound plan, giving you confidence in your financial future.

Keeping you informed of new recommendations, the impact of those recommendations, as well as disclosing all important information associated with those recommendations, removes unwanted surprises.

# #4

## **INDEPENDENCE.**

Your FIDUCIARY works solely for YOU.

Your FIDUCIARY is required by law not to engage in any self-dealing or other conflicts of interest that are not in your best interest.

# #5

## **CONFIDENCE.**

Your FIDUCIARY imparts confidence.

Knowing that you have a FIDUCIARY working for you gives you the confidence to know that your needs are being addressed in the most professional manner available and with your best interests at heart.

# #6

## **TRUST.**

Your FIDUCIARY's duty to you is the most scrutinized relationship under the law.

Trust, once earned, is the highest honor any advisor can receive from a client. One of an advisor's biggest challenges is telling their client what they need to hear...especially when the client does not want to hear it. Your FIDUCIARY is committed to a code of ethics, with an obligation to give you straight answers, providing the strongest foundation upon which to build trust.

One of an advisor's biggest challenges is telling their client what they need to hear...especially when the client does not want to hear it. By working with a fiduciary, you have an advisor who is committed to a fiduciary code of ethics, with an obligation to give you straight answers that fit your individual needs and work in your best interest.



## **COMMUNICATION.**

Your FIDUCIARY keeps you informed.

Keeping you informed as well as disclosing all important information associated with recommendations, minimizes unwanted surprises, and creates the foundation for a healthy collaborative relationship.



And THAT is why you should trust your nest egg  
with a FIDUCIARY...the elite of the  
financial services industry.

Choose *a* FIDUCIARY

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