

# Code of Ethics

**As an Philanthropic Development Officer I shall abide by the following principles:**

**I shall strive to enhance the prestige of my profession by always representing myself and my firm with the highest integrity.**

**I shall accurately and honestly present all information necessary to enable my clients to make informed decisions. I shall comply with all laws and regulations governing my business and professional activities.**

**I shall help my clients protect insurable obligations and attain their financial goals and objectives. I shall respond promptly to the service requests and concerns of my clients and shall always place their interests above my own interests.**

**I shall respect the confidentiality of information regarding my client's personal and business information. I shall exercise the highest integrity in cooperating with all others who serve the needs of my clients.**

**I shall present investment materials, program illustrations and estate planning concepts, which are clear, honest, fair, and disclose all pertinent information. All such materials shall meet with the approval of regulatory authority and be in compliance with industry standards.**

**I shall maintain and increase my professional knowledge, skills, and competence through continuing education.**

**I shall allow my professional conduct to be reviewed by my clients to ensure consistency with the above principles.**

