

ETHICS

CORE VALUES AND BUSINESS PRACTICES

At the heart of our success and the strength of our reputation is our commitment to fostering and maintaining a culture of putting clients first. We are passionate about delivering the best possible service to each and every client and aim to be a champion of high standards of professionalism in the Financial Services Industry.

OUR FIVE CORE VALUES ARE:



HONESTY AND INTEGRITY

We will act with the highest ethical standards and integrity, dealing with all stakeholders in an open, clear and co-operative manner. We will always treat clients, regulators, colleagues and providers with respect.



RELIABILITY

We will always act in the best interests of each client, basing our recommendations and decisions on a clear understanding of client needs, priorities, concerns and circumstances. We will provide a high standard of service, acting with skill, care and diligence.



THE PURSUIT OF GROWTH AND LEARNING

We will ensure that our knowledge and expertise is kept up to date and relevant and encourage all staff to embark upon continuous professional development at all levels.



THE PROMOTION OF EQUALITY, DIVERSITY AND INCLUSION

We will treat people fairly, always acting openly and honestly. We view each client as an individual and promote jargon-free financial advice at a level and depth to suit individual needs.



COMPLIANCE

We will comply with the CII Code of Ethics and all relevant laws and regulations, working not only within the letter of the law, but also within its spirit.