



# Stronger together

Being an Associate Firm means we are publicly aligned with the **Personal Finance Society**, the professional body for the financial planning sector.

Together we are striving to build public trust in financial services and elevate the importance and value of financial wellbeing through regulated personal finance and investment advice. We are committed to:

- investing in our people
- adopting a customer charter which defines our commitment to our customers
- advancing the profession by making a positive contribution to our society and community.

We voluntarily adopt the eight core principles of being an Associate Firm:

1. Act in the best interests of clients, using a customer charter to aid transparency
2. Demonstrate integrity, probity and fairness by aligning with the code of professional ethics and conduct
3. Comply with the spirit as well as rules of regulation
4. Comply with the spirit as well as the rules of employment law
5. Invest in your people by funding a policy of ongoing training & professional development
6. Operate a clear diversity & inclusion policy, for both your staff and clients
7. Operate a policy of corporate social responsibility
8. Adhere to transparent governance standards and processes.