



# The eight core principles of being an Associate Firm

As an Associate Firm we adopt the professional standards and code of ethics set by the Personal Finance Society and believe in an inclusive united culture which places clients and staff at its heart.

## **Our culture is guided by these eight core principles:**

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 our people by funding a policy of ongoing training & professional development
6. Operate a clear diversity & inclusion policy, for both our staff and clients
7. Operate a policy of corporate social responsibility
8. Adhere to transparent governance standards and processes.