CAPITAL FIDUCIARY ADVISORS

Our Wealth Management Oath

We will fully educate you in regards to your customized investment portfolio and the research behind each of our recommendations;

We will define precisely what our responsibilities are with respect to our ongoing wealth management advisory relationship;

We will provide full transparency and disclosure in all aspects of our management advisory relationship;

We will provide you with clearly measurable objectives and metrics for evaluating progress toward your individual investment goals;

We will define and communicate our superior service standards, including:

The Team

- ~ A dedicated team of experienced financial professionals with extensive industry experience and knowledge that is available via phone, email or in-person
- ~ Inquiries will be answered promptly and always within 24 hours

Services Provided

- ~ Your service team will facilitate and advise you on all facets of your investment portfolio, including evaluation, construction, rebalancing, trading, reporting, and money transfers

Our Deliverables

- ~ An evaluation of your current portfolio and an analysis of your investment needs
- ~ Monthly statements provided by custodian
- ~ Comprehensive quarterly performance reports and account reviews
- ~ Comprehensive year-end tax summary statements of your accounts

We will conduct ourselves with the highest moral and ethical standards, and we pledge to act professionally in your best interest at all times;

We will always maintain professional objectivity and integrity;

We will provide superior service at all times.