HERITAGE WEALTH
FINANCIAL PLANNING

Our Code of Ethics & Values

Heritage Wealth Management's mission is to put our clients at the heart of everything we do. Our Values and Principles guide us in all our actions – from strategic decisions to our day-to-day interactions. The following principles form our Code of Ethics & Values here at Heritage Wealth, and they describe how we do business on a continuous basis. They are rooted in Heritage Wealth Management's culture and help us to deliver on our purpose.

Clients' Best Interests

We will always act fairly, honestly, and in the best interests of our clients, putting our clients' financial interests ahead of our own.

Professionalism

We behave with dignity and courtesy to clients, fellow professionals, and others in business-related activities, complying with appropriate rules, regulations and professional requirements.

Integrity

We recognise that we are placed in a position of trust by our clients. We strive to earn and maintain that trust through our personal integrity and honesty. We always act with candour, and in accordance with the letter and spirit of our Code of Ethics.

Competence

We will maintain the knowledge and skills necessary to provide professional services competently. Competence requires attaining and maintaining an adequate level of knowledge, skills and abilities in the provision of professional services. Competence also includes the wisdom to recognise one's own limitations and when consultation with other professionals is appropriate or referral to other professionals necessary.

Objectivity

We will always provide professional services objectively. Objectivity requires intellectual honesty and impartiality. We will protect the integrity of our work, manage conflicts and exercise sound professional judgment.

Confidentiality

We preserve all client's personal and business information as confidential and privileged and allow access only to those who are legally authorised to access such information.

Fairness

We act fairly in all professional relationships, providing clients with what they should expect from a professional relationship, including honesty, disclosure of conflicts of interest, and provision of all relevant facts to enable our clients make informed decisions.

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email: gerard@heritagewealth.ie
web: www heritagewealth ie
Mobile: 083 466 2040
Telephone: 021 239 088

www.heritagewealth.ie