

Fiduciary Code of Ethics

- Judiciously protect the right to privacy by keeping confidential the affairs of the Client.
- Comply with all statutory requirements, be knowledgeable of applicable policies and procedures and keep informed of existing Local, State and Federal Laws as a minimum guide for the fulfillment of responsibilities to the Clients.
- Never exceed the bounds of legally granted authority.
- Maintain an attitude of fairness, honesty, respect, courtesy and good faith in all professional relationships.
- Cooperate with colleagues to promote common interests and concerns and facilitate ethical and competent professional performance.
- Accept their professional fees as the total compensation for services.
- Fiduciaries, their associates or their family shall not benefit personally from any estate transaction.
- Manifest personal integrity and assume responsibility and accountability for individual judgments.
- Avoid any conflict of interest or appearance of conflict of interest.
- Seek and maintain competence in professional skills and contribute to the ongoing development of the profession's body of knowledge.
- Manage estates prudently; with care and judgment, maintaining detailed fiduciary records.
- Seek competent professional advice where this knowledge would benefit the Client.