

Milestones Financial, LLC

Canon of Ethics

I will uphold the following Canon of Ethics in my dealings with clients:

I am in a fiduciary relationship with clients, which means that I will put each client's interests first, before my interests or any others, and disclose potential conflicts of interest to all clients and prospective clients.

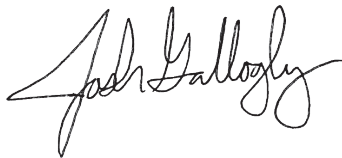
I will conscientiously complete all work agreed to in a prompt and timely manner.

I will provide financial planning services solely as a fee-only advisor. I will act objectively in all matters with clients and will not accept any commissions based on advice or recommendations given.

I will continually strive to improve upon the competence and the quality of services I provide.

I will maintain the highest level of professional integrity in relationships with clients, associated professionals, and government officials.

To the extent allowed by law, I will hold confidential all information shared with me by potential and contractual clients.



Josh Gallogly, CFP®, EA
Managing Member and Founder, CERTIFIED FINANCIAL PLANNER™
Milestones Financial, LLC



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DISCLOSURE

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