

Milestones Financial, LLC

Pledge to Clients

In my dealings with clients, I pledge to be:

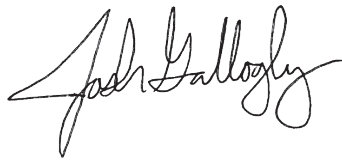
Holistic in outlook. I will consider everything I know about your relevant circumstances, needs, goals, values, and aspirations when making recommendations.

Professional in conduct. I will strive to maintain the highest ethical standards possible in my work and life. I will enhance my skills and credentials through ongoing continuing education, and I will refer you to other professionals when you need help in an area outside my expertise.

Educational in nature. I will guide you through your options and explain them clearly to help you make the best choices. I will take the time to help you understand my advice.

Independent in compensation. I will not take a commission when making a recommendation or accept a referral fee from another professional. You will receive objective, unbiased advice from me.

Committed to your success. Financial planning is a process and not an event, and I commit to adjusting your plan as your life goals and circumstances change.



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



DISCLOSURE

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