

# Milestones Financial, LLC

## Pledge to Clients

### In my dealings with clients, I pledge to be:

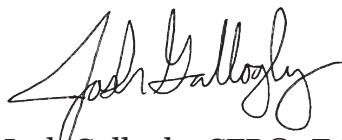
**Holistic in outlook.** I will consider everything I know about your relevant circumstances, needs, goals, values, and aspirations when making recommendations.

**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 advice from me.

**Committed to your success.** Financial planning is a process and not an event. If after our initial engagement your life goals and circumstances change, I am committed to being available for future consultations to ensure your plans remain on track.



Josh Gallogly, CFP®, EA

Managing Member and Founder, CERTIFIED FINANCIAL PLANNER®

Milestones Financial, LLC



**milestones**  
FINANCIAL

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