

# 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.

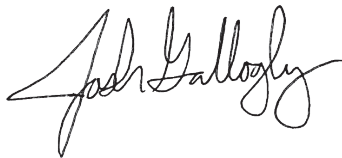
I will conscientiously complete all work agreed to in a prompt and timely manner.

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

## DISCLOSURE

Milestones Financial, LLC (“Milestones Financial” and “its”) is a registered investment advisor offering advisory services in the State of Ohio and in other jurisdictions where exempted. Registration does not imply a certain level of skill or training.

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