STRATEGIC
WEALTH
Ch.P.

collective wisdom/inspired prosperity

THE CHARTER OF STRATEGIC WEALTH PROFESSIONALS

Strategic Wealth is the highest state of continuous, blended wealth management. It is the process and the means by which a person gains genuine freedom of choice and peace of mind. It establishes a single point of designated expertise – the Chartered Professional (Ch.P.) *Strategic Wealth* – who connects personal finance, investments and security to foster life-long financial wellbeing and prosperity.

Our Purpose...

(1) To optimize the whole financial wellbeing of our clients; learning from the past to earn trust in the present and build security for every possible future.

(2) To harmonize the individual segments of personal wealth in both education and practice.

(3) To apply real financial science and continuous learning in building, preserving and distributing wealth.

(4) To achieve these goals within a code of conduct that demonstrates the highest possible ethics, sensitivity and personal service.

(5) To meet the most rigorous proficiency standards in wealth management as established by industry leaders, advisors and the financial academic community.

Our Promise...

To know more, to know better – to be informed, to prove the ideal. To be without bias – and so be worthy of personal trust.

Our Character...

Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives. Total quality is our character – it is the new standard as set by Chartered Professionals in the practice of *strategic wealth.*

WISDOM – INTEGRITY – PARTNERSHIP – CLIENT INSIGHT