

Centric Wealth's Professional Promise

Context

Centric Wealth provides an important service in helping clients manage and protect their financial affairs. Few other professions see practitioners as closely connected with their clients or have them be as present in their clients' lives at key decision making times and life's significant events. Clients expect, and deserve, considered advice from specialists who consistently act with integrity.

Centric Wealth was founded on the principle of client first and continues to lead the industry in the provision of high quality, professional advice and service.

Each and every member of the Centric Wealth team is asked to personally acknowledge they will deliver on the Professional Promise. This promise governs how we interact with clients, with clients' other professional advisers, with product and service providers and how we interact with each other. It translates Centric Wealth's key values into behaviours we can act on every day in our working lives. While the promise of professionalism remains constant, this document is a living text which will develop over time as we work to better articulate our relationship with our clients, our colleagues and the wider community.

Principles

In my contact with clients I will:

- Act with respect and courtesy.
- Place client interests first before all others'.
- Act with diligence and dedication as I devote my skills, experience and energy towards clients' affairs.
- Provide holistic advice to the best of my ability and in conjunction with clients' other professional advisers.
- Encourage questions.
- Respond promptly and carefully to enquiries.



- Do all I can to help clients feel confident and secure in their relationship with me, my colleagues and Centric Wealth.
- Show clients I care.

In my contact with colleagues I will:

- Act with respect and courtesy regardless of title or role.
- Be punctual in attending all meetings and responding to all requests.
- Commit to ongoing learning and professional development for myself and assist those around me to do the same.
- Be vigilant in supporting my colleagues.
- Do all I can to make Centric Wealth one professional team fully engaged with our clients and their interests.

In my contact with clients' other professional advisers outside Centric Wealth I will:

- Act with respect and courtesy.
- With client consent, make myself and any information available with the aim of providing our mutual client a team approach to their matters.
- Return telephone calls, emails and other communications as promptly as I can to facilitate our mutual client's affairs.

In my conduct toward everyone with whom I deal, I will:

- Remember that I am part of a growing profession, and that my actions and words reflect upon my profession, my colleagues and Centric Wealth.
- Act at all times with professional integrity, so that others will know that my word is my bond.
- Treat everyone as I want to be treated — with respect and courtesy.
- Act as a role model and mentor for less experienced professionals.
- Contribute my skills, knowledge and influence in the service of my community.
- Encourage those I work with to act with the same professionalism to which I aspire.