

PUTTING YOUR BEST INTERESTS FIRST

Snider Talbot Financial Planning – Fiduciary Oath

03.01.2025

We believe in placing your best interests first. Therefore, we are proud to commit to the following five fiduciary principles:

- We will always put your best interests first.
- We will act with prudence; that is, with the skill, care, diligence, and good judgment of a professional.
- We will not mislead you, and we will provide conspicuous, full and fair disclosure of all important facts.
- We will avoid conflicts of interest.
- We will fully disclose and fairly manage, in your favor, any unavoidable conflicts.

This is the oath that has been developed by the Committee for the Fiduciary Standard. We subscribe to it fully and use it to guide us in our business.

As registered investment advisors, we are legally obligated to place your interests first. We are fiduciaries. This means that we must not only be loyal to serving your exclusive best interests, we must also adhere to a high standard of professional competence.

Please let us know if you have any questions or concerns.

Thank you! Jerry, Richard, Jim, and Tom