Landmark Wealth Management, LLC
Registered Investment Advisor

Client Bill of Rights

We Serve You in a Fiduciary Capacity

You are entitled to a Fiduciary standard, a higher standard of care, and a commitment to eliminate conflicts of interest between the client and advisor. As Fiduciaries we must act in your best interest.

World Class Customer Service

You deserve to have the highest level of professional and courteous service with all of your interactions. We are not experts in all areas, but our clients need expert answers. We will not hesitate to utilize the expertise of other professionals if we believe that a better solution will result for our client.

Trusted Advisors

You have the right to work with a trustworthy financial advisor. Your advisor will develop a personalized plan with your goals in mind, utilizing our core beliefs, management philosophy, and investment outlook.

Confidentiality

You have the right to strict confidentiality, complete discretion, and full protection of your personal and financial information.

Prompt Response

You are entitled to have us respond promptly and appropriately to all questions and inquiries. Your calls and emails will be returned by the end of the day, or sooner, if the matter is time sensitive.

Transparency

You are entitled to know the *true* costs for all of the investments you own and have those costs explained in easy to understand terms, along with the ability to view your accounts at any time.

Frequent Communication

You are entitled to contact us whenever you have a question or concern about your financial life. We provide ongoing communication in the form of periodic emails, quarterly updates, and annual reviews. When more attention is needed, we are always available for phone calls, emails or face-to-face meetings.

Education

You have the right to an educational approach to the investment process with the goal of demystifying the world of investments, provided to you without a sales pitch.

Looking Beyond the Numbers

You have the right to be treated as unique with your own needs, a client who deserves a personalized solution. We will not only strive for overall performance; we will also work with you on tax efficiency, asset location, and savings maximization, consistent with the objective of enhancing your financial well-being.

Our Promise: We Will Always Place You at the Center of Everything We Do!