

# BAMBOO WEALTH

## Code of Ethics



FINANCIAL PLANNING

**SAM TABIT**

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*As a Corporate authorised representative of Affinia Financial Advisers and a Certified (CFP) Member of the Financial Planning Association (FPA), Bamboo representatives abide by the following Code of Ethics to maintain a high standing in the community and gain our clients trust for long lasting relationship.*

**1. Integrity**

We observe high standards of honesty & integrity in conducting and providing financial planning services

**2. Objectivity**

We are objective in providing advice and services. We will be transparent in information you the type of advice you will be receiving.

**3. Competence**

We provide competent financial advice by maintaining up to date knowledge ,skills & qualification. Our senior adviser holds both a Masters in Financial Planning and is a Certified Financial Planner.

**4. Fairness.**

We provide advice and service in a manner that is fair, honest and reasonable.

**5. Diligent**

We act with due skill, care and diligence in the provision of financial planning services

**6. Professionalism**

We ensure all conduct and priorities brings credit to the profession and to our clients

**7. Confidentiality**

We do not disclose any confidential information without the specific consent from you unless compelled to do so by law, or as required to fulfil any legal obligations.

**8. Compliance**

We ensure all conduct complies with Affinias financial planning's professional Standards, relevant legislation and regulations

