

WOMEN'S CREDO

1. WE EMPOWER

We never tell our clients what they should do. Instead we outline their options, providing the pros and cons so the client is empowered to make an informed decision. We collaborate and assist in helping our clients evaluate and discuss their options and the potential outcomes of each decision.



2. WE ARE HIGHLY COMPETENT & EDUCATED

Our technical skills in personal finance are broad and deep. At minimum every volunteer has a B.S. in Personal Finance or related field and has a quality designation such as the CFP®, CFA, CPA to enhance our competency. We are continuous learners keeping up with this fast-paced industry. Where we lack competency we refer the client to another resource who has that competency.



3. WE ARE HIGHLY ETHICAL

We advise in the client's best interest, as pure fiduciaries. We do not mention or discuss any commercial affiliations. We provide unbiased, objective and non-commercial advice.



4. WE EDUCATE

We educate our clients on both current financial concerns and potential future areas of concern. We believe comprehensive knowledge and awareness of intersections can lead to better decision making and future planning.



5. WE PROVIDE SOLUTIONS, NOT JUDGEMENTS

We are not here to judge or focus on regrets but rather help our clients find solutions to move forward. We do not ask clients to justify past decisions but do ask that they provide a complete and accurate picture so we can assist with next steps. The more we understand, the better we can help.



6. WE HAVE A NETWORK OF SUPPORT

None of us are expert in everything. For that reason, we continue to build a network of specialist who believe in our mission and will often provide free or discounted services to facilitate the Women's Money Empowerment mission.



7. WE CARE

Sometimes we are just here to listen or provide a sounding board. Other times we are here to offer a shoulder to cry on. Our clients know they are not alone and they have a resource who will not take advantage of them or make them feel worse.



8. WE EMBRACE MENTORING AND ADVOCATING FOR EVERYONE

We help all women - regardless of age, background or professional/social status. In fact, we help everyone, including other genders that request assistance. We are inclusive for everyone while at the same time providing women a welcoming and secure place to seek responsible guidance.



9. WE ARE GENUINE IN OUR RELATIONSHIPS

We value honesty and trust. We understand we are being entrusted with people's lives and with people's money and we are careful to ensure we are efficient, effective and trustworthy with all resources. We are quick to own our missteps and work diligently to turn everything right again.



10. WE CELEBRATE ALL OF OUR CLIENT'S, OUR VOLUNTEER'S AND OUR SPONSOR'S WINS

A win for the individual is a win for all of us!



As introduced in Gender On Wall Street: Uncovering Opportunities for Women in Financial Services published by Palgrave Macmillan