

Signature: 
Jason Preti (Mar 25, 2015)

Email: jason@unleashedfinancial.com

FIDUCIARY OATH PUTTING YOUR INTERESTS FIRST



I believe in placing your best interests first. Therefore, I am proud to commit to the following five fiduciary principles:

I will always put your best interests first.

I will act with prudence; that is, with the skill, care, diligence, and good judgment of a professional.

I will not mislead you, and I will provide conspicuous, full and fair disclosure of all important facts.

I will avoid conflicts of interest.

I will fully disclose and fairly manage, in your favor, any unavoidable conflicts.

Advisor Signature


Jason Preti (Mar 25, 2015)

Advisor Name

Jason Preti

Date

Mar 25, 2015







Fiduciary Oath

EchoSign Document History

March 25, 2015

Created:	March 25, 2015
By:	Alan Moore (alan@xyplanningnetwork.com)
Status:	SIGNED
Transaction ID:	XL9KPZZ5J3T7J5V

“Fiduciary Oath” History

-  Widget created by Alan Moore (alan@xyplanningnetwork.com)
April 08, 2014 - 7:34 PM MDT
-  Widget filled in by Jason Preti (jason@unleashedfinancial.com)
March 25, 2015 - 3:05 PM MDT - IP address: 50.46.219.129
-  User email address verification waived
March 25, 2015 - 3:05 PM MDT - IP address: 50.46.219.129
-  Signed document emailed to Alan Moore (alan@xyplanningnetwork.com) and Jason Preti (jason@unleashedfinancial.com)
March 25, 2015 - 3:05 PM MDT