

Signature: Joseph W. Morgan
Joseph W. Morgan (Sep 2, 2015)

Email: joe@jwmwealth.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

Joseph W. Morgan
Joseph W. Morgan (Sep 2, 2015)

Advisor Name

Joseph W. Morgan

Date

Sep 2, 2015