



MILESTONES

FINANCIAL PLANNING, LLC

Johanna Fox Turner, CPA, CFP®, RLP® Principal

Code of Ethics for Milestones Financial Planning, LLC

In the world of financial services, the CFP® designation is the only one that demands strict adherence to a professional Code of Ethics specific to the practice of financial planning. The Advisor is also a member of the Financial Planning Association ("FPA"), which also includes a mandate that members adhere to the same Code of Ethics that reflect their commitment to help clients achieve their life goals. As a CFP® professional and a member of the FPA, MFP's Code of Ethics is based upon the same seven Principles, as follows:

- **Integrity:** Milestones Financial Planning, LLC and its Advisors shall offer and provide professional services with integrity.
- **Objectivity:** Milestones Financial Planning, LLC and its Advisors shall be objective in providing professional services to clients.
- **Competence:** Milestones Financial Planning, LLC and its Advisors shall provide services to clients competently and maintain the necessary knowledge and skill to continue to do so in those areas in which they are engaged.
- **Fairness:** Milestones Financial Planning, LLC and its Advisors shall perform professional services in a manner that is fair and reasonable to clients, principals, partners, and employers, and shall disclose conflict(s) of interest in providing such services.
- **Confidentiality:** Milestones Financial Planning, LLC and its Advisors shall not disclose any confidential client information without the specific consent of the client unless in response to proper legal process, to defend against charges of wrongdoing, or in connection with a civil dispute between the firm/Advisor and the client.
- **Professionalism:** The conduct of Milestones Financial Planning, LLC and its Advisors shall in all matters reflect credit upon the profession.
- **Diligence:** Milestones Financial Planning, LLC and its Advisors shall act diligently in providing professional services.

Milestones Financial Planning, LLC will provide a copy of its code of ethics to any client or prospective client upon request.