

Investment Planning Counsel Code of Ethics



Live your dream.

AT INVESTMENT PLANNING COUNSEL, WE CONDUCT OURSELVES WITH THE UTMOST INTEGRITY IN ACCORDANCE WITH THE HIGHEST STANDARDS OF ETHICAL BUSINESS PRACTICES AND ADHERE TO THE FOLLOWING CODE OF ETHICS:

Integrity

- We demonstrate the highest level of integrity, always placing the interests of our clients above our own.
- We disclose to our clients all sources of compensation, along with any potential conflicts of interest, for all recommendations made and services performed.
- We make every effort to provide objective and complete information to our clients regarding their financial needs and realistic advice about their options, describing the potential strengths and drawbacks of each.
- We continually seek to maintain and improve our knowledge, skills and competence, providing advice to our clients only on matters within our areas of expertise.
- We are free to make unbiased recommendations to our clients and are under no obligation to sell proprietary products.

People and Relationships

- We work through our advisors to bring value to our clients and our shareholders.
- We know our clients and develop innovative products and services to anticipate and meet their evolving needs and desires.
- We develop and challenge our advisors and employees to achieve their full potential, individually and as a team, by creating a dynamic workplace.

Success

- We develop strategic alliances with like-minded companies to enhance our core competencies, serve our clients more effectively and steadily build our business.
- We are performance driven, continually measuring and monitoring our achievements and making adjustments where necessary.
- We use advanced technology to innovate, improve our effectiveness and deliver value to our advisors, our clients and our shareholders.

Don Taylor, B.A., CLU, Ch.F.C.
Integrated Financial Planner

Tel: 613-221-5959 Email: dontaylor@ipcplanning.com

Web: www.ipcplanning.com

211 - 38 Auriga Drive, Nepean, ON, K2E 8A5

 **Investment
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