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.

WPG THE WEALTH PLANNING GROUP

Investment Planning Counsel®
FINANCIAL SOLUTIONS FOR LIFE

Building lasting legacies for *Canadians* who care