Brian H. Farr
Financial Coaching

Code of Ethics

I will support and focus on my client's agenda as the most important objective of our relationship.

I will protect my client's confidentiality, unless I am authorized by my client to release confidential information, or I am required by law to release such information, or an intent to harm oneself or others has been disclosed.

I will provide a clear understanding of the financial coaching engagement and expectations prior to accepting a client. This will include, as a minimum, terms of payment, expected frequency and format of meetings, and any policies that might impact fees or delivery of service.

I will immediately advise my client if any conflict of interest arises or if I believe I am unable to serve as their financial coach for any reason.

I will not use the coaching relationship to obtain any sexual, personal or financial advantages or favors.

I will inform my client, in advance, if I have a vested interest in any referral or suggested actions or activities.

I will not knowingly make any false or intentionally misleading statements or claims to my clients.

Under no circumstance will I engage or collude in any illegal activity.

As a Professional Financial Coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients, colleagues and to the public at large.

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