



ETP Wealth Management Client Bill of Rights

NO MATTER THE VALUE OF YOUR PORTFOLIO

YOU HAVE THE RIGHT TO WORK WITH AN ADVISOR WHO:

IS INDEPENDENT & ADVISES SOLELY UPON YOUR NEEDS AND GOALS

TAKES INSTRUCTIONS ONLY FROM YOU AND NOT FROM HER CEO

IS OPEN, CLEAR, UNDERSTANDABLE, AND RELIABLE

PROFESSIONALLY COMPETENT AND RESPONSIBLE

PROMPTLY REPLIES TO YOUR INQUIRIES

COMMUNICATES FREQUENTLY WITH YOU

GUARDS YOUR CONFIDENTIALITY

WHO VALUES YOU AS A PREMIER CLIENT

PROVIDES APPROPRIATE INVESTMENT SOLUTIONS

FULLY DISCLOSES THE RISK AND REWARD FOR EACH SOLUTION

HELPS YOUR UNDERSTANDING OF INVESTMENTS AND STRATEGIES

WHO IS MULTI LICENSED TO HELP YOU SOLVE ANY ESTATE ISSUE

ESTATE TRANSITION PROFESSIONAL®

A REGISTERED TRADEMARK OF ETP WEALTH MANAGEMENT

WILLIAM MASSARWEH, ESQ - WWW.ETPWEALTH.COM - 925.937.9866