

HOW OUR FIDUCIARY STANDARD PROTECTS YOU

The Fiduciary Standard is a higher level of responsibility for an advisor. It goes beyond simple suitability requirements and mandates that any advice on products and strategies be provided in the best interests of the investor. A fiduciary who manages assets has a legal and ethical obligation to put the investor's interests before their own. This standard has always been at the core of Karp Capital Management's mission to our clients.



OUR COMMITMENT TO YOU

We put your needs first. We are committed to the highest professional and personal standards. Our sole focus is on your financial needs and goals, and how we can best help you pursue them.

We act in your best interests. We are committed to putting your needs and goals before those of our firm. We strive to avoid any conflicts of interest, and if they arise and are unavoidable, we disclose these to you immediately. We provide a high level of transparency around any fees or expenses associated with your accounts, so that you always know what you own and what you're paying for it.

We are an independent and objective resource. As an independent firm, we provide you with objective, unbiased advice based solely on your needs and goals. We have no vested interest in promoting a particular product or service. Our only interest is that your financial objectives are met.

SAFEGUARDING YOUR FINANCIAL DREAMS

When it comes to advisory services and managing your money, your financial relationships should be built on a foundation of trust, integrity, and transparency. Not all firms and advisors adhere to the same standards.

We remain committed to earning and maintaining your trust through expert advice and effective strategies, tailored to your unique needs.

We define our success by seeing you succeed in achieving your financial goals.

QUESTIONS? CONTACT US:

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