



Steven L. Kane, CPA/PFS, CFP®

Our Pledge

We promise to:

- Put our investors' interests first at all times.
- Manage investments with prudence, a long-term perspective, and the goal of providing returns consistently better than those of competitors.
- Hold ourselves to the highest standards of ethical behavior and fiduciary responsibility.

A fiduciary is "one who acts in utmost good faith, in a manner he or she reasonably believes to be in the best interest of the clients" as defined by the Certified Financial Planning (CFP®) *Standards of Professional Conduct*.

- Strive to be the highest-value provider of investment services by offering outstanding performance and service while keeping costs as low as possible.
- Communicate candidly about investment risks and costs as well as potential rewards.
- Strive to maintain highly effective controls to protect the assets and confidential information that are entrusted to us.
- Employ a talented, diligent, and diverse crew to ensure that our clients are well served.
- Adapt, evolve, and continuously improve in pursuit of excellence in all we do.

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P.S. Kane Company, P.C. is and has always been a fee-only financial advisor, meaning all compensation received is solely from the client. Zero compensation is contingent on the purchase or sale of any financial product.

