Client Bill of Rights

Strategence Capital

The first of these is of the highest priority to us. After it, each right is presented in no particular order.

God-honoring Service
You have the right to expect us to act with the highest levels of integrity, competence, and diligence, and you have the right to expect us to honor God in all we do.

Trusted Advisors
You have the right to expect us to serve as your trusted advisors, a team you can turn to when you financial needs and questions.

Recommendations as a Fiduciary
Within our advisory business, you have the right to expect recommendations for you that are in your best interest; not ours. That includes finding and recommending the most cost-effective investments available. We will exercise independence and objectivity in advising you.

Reasonable Basis
We will make every effort to understand your circumstances so that our recommendations are suitable for you and based on your unique goals, objectives, and situation.

Confidentiality
You have the right to expect the utmost confidentiality with regard to information you provide us.

Transparency
You have the right to know every and all costs for portfolio management, transactions, and advisory services. We promise to convey this information in a jargon-free, clear way.

Prompt Response
You have the right to expect a prompt return phone call or email. We commit to getting back to you by the end of each day to at least acknowledge your inquiry, along with a time frame for answers to your questions.

Timely Communication
You have the right to expect timely communication from us. Our goal is to anticipate your needs before you know them and answer your questions before you ask them.

Education
You have the right to be educated about all aspects of our relationship with you. We will, as much as possible, use plain language when we describe these to you, and we will try to tailor presentation formats to what makes the most sense to you.

Accuracy
You have the right to expect that care is taken in being accurate as we fulfill your requests, and the statements you receive from us will be accurate.