

# Chartered Strategic Wealth Professional CSWP™

*collective wisdom/inspired prosperity*

## THE CHARTER OF STRATEGIC WEALTH PROFESSIONALS

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Strategic Wealth is the highest state of continuous, blended wealth management. It is the process and the means by which a person gains genuine freedom of choice and peace of mind. It establishes a single point of designated expertise – the Chartered Strategic Wealth Professional (CSWP™) – who connects personal finance, investments and security to foster life-long financial wellbeing and prosperity.

### **Our Purpose...**

- (1) To optimize the whole financial wellbeing of our clients; learning from the past to earn trust in the present and build security for every possible future.
- (2) To harmonize the individual segments of personal wealth in both education and practice.
- (3) To apply real financial science and continuous learning in building, preserving and distributing wealth.
- (4) To achieve these goals within a code of conduct that demonstrates the highest possible ethics, sensitivity and personal service.
- (5) To meet the most rigorous proficiency standards in wealth management as established by industry leaders, advisors and the financial academic community.

### **Our Promise...**

To know more, to know better – to be informed, to prove the ideal. To be without bias – and so be worthy of personal trust.

### **Our Character...**

*Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction and skillful execution; it represents the wise choice of many alternatives.* Total quality is our character – it is the new standard as set by Chartered Professionals in the practice of strategic wealth.

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