

FIDUCIARY OATH PUTTING YOUR INTERESTS FIRST

I believe in placing your best interests first. Therefore, I am proud to commit to the following five fiduciary principles:

1. I will always put your best interests first.
2. I will act with prudence; that is, with the skill, care, diligence, and good judgment of a professional.
3. I will not mislead you, and I will provide conspicuous, full and fair disclosure of all the important facts.
4. I will avoid conflicts of interest.
5. I will fully disclose and fairly manage, in your favor, any unavoidable conflicts.

Mangesh Mohite

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Founder of IRIS Special Needs Financial Planning