



Fearless Ethical Decision Making

Financial Planning Glossary

- **Ethics** → Trust → Commercial Success.
- **Ethics** → Happiness → More Success.
- **Business Ethics:** Doing what's best for your company ... and your clients ... staff ... shareholders ... profession ... and the planet we share. Value *creating* behaviours.
- **Unethical Business:** Value *destroying* behaviours (with long-term consequences).
- **Ethics in Financial Planning:** Trust *plus* Reputation.
- **Trust:** Competence *plus* Benevolence *plus* Integrity.
- **Planners of Endearment:** Planners who endear themselves to more business by focusing ethically on the long-term needs and aspirations of their clients.

Workshop Reflections

- What are 3 core values that are important to you personally in business?
E.g. Integrity, Professionalism, Service, Honesty, Reliability ...
- Would you be willing to stand up for any of your core values?
- What are 3 value *destroying* behaviours in the financial planning profession?
- Would you be willing to speak up to help correct these behaviours?
- What changes can you make with ethics to create value, trust and reputation?

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