

OUR CLIENTS' BILL OF RIGHTS

At Cassaday & Company, Inc., we believe that there are certain things you deserve and should expect from any financial planning firm.

We promise a commitment to the following:

Your right to privacy and security

Your account information is kept strictly confidential at all times, safeguarded by industry-leading technology.

Your right to be heard

Cassaday & Company, Inc. always welcomes and encourages your comments, good or bad, via email, phone or in-person. Our clients' feedback is an integral part of our firm's success and our team is always available to speak with you.

Your right to be informed

We believe it is important to educate you and keep you informed about anything that may impact your investments and financial plan, and we strive to do this through newsletters, webinars and in-person meetings.

Your right to objectivity and impartiality

You can always trust that our guidance is based on what our training and experience tells us is the best solution for you.

Your right to equal and fair treatment

Uniformity of our investment management process assures equal and fair treatment for each client.





Your right to great customer service

You may expect the most courteous and prompt customer service possible from our highly trained, competent and professional support staff.

Your right to performance reporting on your accounts

You will receive regular reports on the progress of your accounts, designed with input from our clients for relevance and ease of use.

Your right to continuous investment management

Cassaday & Company, Inc.'s investment management process assures that portfolios are reviewed, monitored and administered on an ongoing basis pursuant to your personal investment policy.

Your right to simplification

Cassaday & Company, Inc.'s systems are designed to simplify all aspects of the investment management and financial planning processes.

Your right to total satisfaction

Our goal is your complete satisfaction. We want to hear from you to ensure that we are meeting this goal and how we can continue to do so.