

For more information, visit:

www.e-bex.com



REFERRED BY A **FRIEND**

The Business Executive Exchange is a self-run, non-profit association comprised of professionals from many disciplines. Only one firm in BEX may represent each type of business category, and each member must pledge to conduct business with the highest regard for Quality, Financial Responsibility, Fairness, and Integrity

www.e-bex.com



Founded 1983

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CODE OF ETHICS

The members of the Business Executive **Exchange** pledge to deliver professionalism in their client relationships. Toward that commitment, each has agreed to an oath of conduct that includes the following service guidelines:

OUALITY

To deliver the finest product or service available at the level of quality required by the customer.

FINANCIAL RESPONSIBILITY

To offer pricing that yields sound value to the customer, while affording sufficient profit margin to maintain an excellent level of supportive service and the prompt payment of suppliers' products and services.

FAIRNESS

To treat clients with respect and honesty, considering that each of us, as individuals, deserves the greatest opportunity for achievement and self-esteem.

INTEGRITY

To hold the reputation of the referring member in high regard, knowing that any failure in service or quality will reflect directly upon the good standing of that member in the business community.

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October 18, 2017



BEX SERVICES DIRECTORY

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Steve has worked in financial services for nearly 30 years. He has earned his CERTIFIED FINANCIAL PLANNER(tm) certification. He offers a wide range of financial services, concentrating in retirement income ideas, estate investment planning and charitable giving. Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC.

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