Expectations

What can a Kaplan Financial Group, LLC client expect?

What Our Clients Can Expect From Us:

- We will take the time and effort to understand your financial situation, needs, and goals, as well as your tolerance for risk.
- We will base our recommendations on your best interests.
- We will contact you regularly to review the performance or your investments and inquire into any changes in your situation.
- We will explain all aspects of any investment we recommend. We will advise you of the potential risks and explain all fees.
- Our basic philosophy is to diversify among quality investments. We will monitor the suitability of your investments to assure that they are appropriate, given your overall risk tolerance and time horizon.
- Each member of our group has individual areas of expertise. You benefit from the resources and strengths of the entire team

What We Expect From Our Clients

- In order to properly advise you, we need comprehensive knowledge of your overall financial position.
- We expect you to keep us informed of any changes in your financial situation and needs.
- We appreciate the referral of others you know that may benefit from our services and expertise.

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