



## Code of Ethics for all ICFE Certificants

**Objectivity:** ICFE Certificants shall strive to be as unbiased as possible in providing advice to clients.

**Confidentiality:** ICFE Certificants shall keep all client data private unless authorization is received from the client to share it. ICFE Certificants shall treat all documents with care and take care when disposing of them. Relationships with clients shall be kept private.

**Competence:** ICFE Certificants shall strive to maintain a high level of knowledge and ability. Certificants shall maintain continuing education to keep current and ICFE Certificants shall not provide advice in areas where they are not capable.

**Fairness & Suitability:** Dealings with and recommendations to clients will always be in the client's best interests. ICFE Certificants put their clients first.

**Integrity & Honesty:** ICFE Certificants will endeavor to always take the high road and to be ever mindful of the potential for misunderstanding that can occur in normal human interactions. ICFE Certificants will be diligent to keep actions and reactions so far above board that a thinking client, or other professional, would not doubt intentions. In all actions, ICFE Certificants should be mindful that in addition to serving our clients, we are engaged in the business of building a profession and our actions should reflect this.

**Regulatory Compliance:** ICFE Certificants will strive to maintain conformity with all applicable legal requirements.

**Full Disclosure:** ICFE Certificants shall fully describe their method of compensation and potential conflicts of interest to clients and also specify the total cost of investments.

**Professionalism:** ICFE Certificants shall conduct themselves in a way that would be a credit to the ICFE at all times. ICFE Certification involves integrity, honest treatment of clients, and treating people with respect.

**Paul S. Richard**  
**ICFE President-Executive Director**

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