



The Credo of Ballentine Partners

ROY BALLENTINE, Founder, ChFC, CFP®

Ballentine Partners, LLC | MA, NH, FL | 781.314.1300

ballentinepartners.com | hello@ballentinepartners.com

Our Credo

We believe our first responsibility is to our clients – the individuals and families who have placed their trust and confidence in us, engaging us to help them manage their financial affairs. Every day, and in every way, we must earn the trust of those whom we serve. That means placing their interests ahead of our self-interests. It also means demonstrating loyalty, operating within our zone of competence, being careful, being responsive, keeping our promises, acknowledging and taking responsibility for our mistakes, and protecting confidential information.

Our ability to fulfill our responsibilities to our clients depends upon attracting and retaining high-performing employees. We must provide an inclusive work environment where each person is treated with dignity and respect. We must respect their diversity and recognize their merit. We must strive to provide them with a sense of security, fulfillment and purpose in their work. Compensation must be fair and adequate and working conditions clean, orderly and safe. We must support their health and well-being and provide them with adequate opportunities to fulfill their family and other personal responsibilities.

We must encourage and empower them to speak up with suggestions to make this a better place to work. There must be equal opportunity for employment, development and advancement for those qualified. And, we must provide highly capable leaders whose actions and decisions are perceived to be just and ethical.

We must strive to be a good corporate citizen. We are responsible to the communities in which we live and work and to the world community as well. We must support good works and charitable activities. We must maintain in good order the property we are privileged to use, protecting the environment and natural resources. We must engage in outreach to bring new entrants into our profession, particularly people who are members of populations currently under-served and under-represented in our profession.

Our final responsibility is to our equity owners. We must manage our business to be financially healthy and strong, so we are able to attract and retain the high-performing team members who are integral to our future success. We must experiment with new ideas, develop innovative programs, make investments for the future and pay for our mistakes. When we operate according to these principles, our equity owners should realize a fair return.