

# *Polaris Financial Partners Earns an A+ Accreditation Rating with the Better Business Bureau*

September 29<sup>th</sup>, 2017

*We are very proud to announce that Polaris Financial Partners, LLC has earned the Better Business Bureau Seal of A+ Accreditation. The BBB Code of Business Practices represents standards for business accreditation by BBB for sound advertising, selling and customer service practices that enhance customer trust and confidence in business.*



*This Code is built on the BBB Standards for Trust, which are eight principles that summarize important elements of creating and maintaining trust in business. To be accredited by BBB, Polaris Financial Partners, LLC (PFP) has met and agrees to abide by the following standards:*

**Builds Trust:** *PFP establishes and maintains a positive track-record in the marketplace.*

*An accredited business has fulfilled all licensing and bonding requirements of applicable jurisdictions; has provided all license and bonding information upon application for BBB accreditation; and provides periodic updates upon request of BBB. PFP has met all applicable standards within the BBB Code of Business Practices.*

**Advertises Honestly:** *PFP adheres to all BBB established standards of advertising.*

*PFP cooperates with BBB self-regulatory programs for the resolution of advertising disputes and uses the BBB name and logos in accordance with BBB policy.*

**Tells the Truth:** *PFP honestly represents products and services, including clear and adequate disclosures of all material terms. All accredited BBB firms like PFP make known all material facts in both written and verbal representations, remembering that misrepresentation may result not only from direct statements but by omitting relevant facts.*

**We Are Transparent:** *PFP identifies the nature, location, and ownership of its business interest and discloses all policies, guarantees and procedures that bear on a client's decision.*

**We Honor Our Commitments:** *PFP abides by all written agreements and verbal representations to the best of our ability. An accredited BBB business like PFP agrees to fulfill agreements reached and honors representations by correcting mistakes, if any, as quickly as possible.*

**We Are Responsive:** *PFP makes a best faith effort to resolve all disputes, which may include mediation if requested by our broker dealer, Cadaret Grant, or by FINRA. PFP complies with any settlements,*

*agreements or decisions reached as an outcome of this dispute resolution process. If a dispute takes place, we cooperate with our self-regulatory organization, FINRA as well as our broker dealer, Cadaret Grant, to eliminate the underlying cause of patterns of any customer complaint. In 33 years, we have not ever had a complaint registered with FINRA.*

*Safeguard Privacy: We protect client data collected against mishandling and fraud, collect personal information only as needed, and respect the preferences of customers regarding the use of their information. As an A+ accredited business PFP agrees to:*

*A. We Respect Your Privacy*

*B. Secure Sensitive Data*

*When we collect sensitive data from a client (bank account numbers, Social Security number, salary, or other personal financial information, etc.) we will ensure that it is transmitted via the most secure means possible.*

*C. Honor Customer Preferences*

*We agree to respect customer preferences regarding contact by telephone, fax and e-mail, and PFP agrees to remedy the underlying cause of any failure to do so.*

*PFP Embodies the Value of Integrity*

*PFP agrees to approach all business dealings, marketplace transactions and commitments at all times with integrity.*

*We at PFP are proud to have earned the Better Business A+ Seal of Accreditation. Please feel free to share this with your friends, colleagues at work and family.*

*Here is a list of our upcoming seminars and events we have in the 4<sup>th</sup> quarter for our friends and clientele:*

- November 8<sup>th</sup> and 10<sup>th</sup> – Our Year End Update and Seminars will be at Eddie Merlot's this fall. The 8<sup>th</sup> is a dinner starting at 6:15 p.m. and the 10<sup>th</sup> is a luncheon commencing at noon – both are at Eddie Merlots.*
- November 19<sup>th</sup> – “An Evening of Hope” at Eddie Merlot's commencing at 5:00 p.m. Hope Hollow is a 501(c)3 that supports cancer patients and their families in Ohio. Polaris Financial Partners is the host and presenting sponsor again this year for “An Evening of Hope”.*
- November 25<sup>th</sup> – Pig Roast and Barbeque at Bob's Home for the Ohio State/Michigan Game that day, starting at Noon. Bring your buckeyes! Open bar, beer and soft drinks will be provided.*
- December 17<sup>th</sup> – The Polaris Financial Partners' Annual Christmas and Holiday Party, starting at 5:00 p.m. We are expecting more than 200 attendees this year. We will have live holiday entertainment, an open bar and a wonderful dinner in the Polaris Hilton Grand Ballroom.*

*If you know your schedule in advance and would like to RSVP to any of the above, please contact Steven at your convenience. We look forward to seeing you soon. Have a terrific weekend!*

***Bob Deitrick and Steven Morgan***

*Securities and advisory services offered through Cadaret, Grant & Co., Inc., member FINRA/SIPC. Polaris Financial Partners and Cadaret, Grant are separate entities.*