Statement of Investor Rights

The “Statement of Investor Rights” was developed by CFA Institute to advise buyers of financial service products of the conduct they are entitled to expect from financial service providers. Demanding that financial professionals abide by these rights helps you build trust in the person and/or firm you engage with and thereby collectively restore trust, respect and integrity in finance.

When engaging the services of financial professionals and organizations, I have the right to...

Appropriate and complete records to support the work done on my behalf.

Financial professionals working on your behalf must document and make readily available to you:

- All information given to you
- All products discussed with and offered to you
- Any decisions that have the potential to affect or have affected your finances (including decisions in which you say no to the product or advice)
- Any and all other pertinent information

www.jamapunji.pk  facebook: jamapunji.pk  twitter: @jamapunji_pk