



## Waypoint Strategic Advisors, LLC

### Code of Conduct

I will always:

1. Deal with family members with integrity, honesty and respect and never criticize another family member's decision in public
2. To the best of my ability attempt to demonstrate courtesy, respect and friendship in dealing with other family members to show others that the family is united
3. Be a professional listener allowing each other to express their views without interruption and challenge
4. Make decisions based on the principles outlined in our family business doctrine
5. Invest in a minimum of one consecutive week per year in personal management and leadership development offered outside the organization
6. Be willing to discuss issues openly and honestly
7. Support the decisions of the Senior Partner publically
8. Address any problem with a family member directly with that person
9. Follow through on all my commitments to other family members unless I notify them in advance
10. Be open to constructive feedback from family members with positive follow-up dialog without shutting down and fostering feelings of resentment
11. Function in my role within the realm of my responsibilities and will not usurp authority or circumvent authority
12. Respect the position of other family members performing their duties as outlined by their personal job responsibilities and support their decisions even if I disagree
13. Be committed to act in conformance and support of this code of conduct

*Registered Investment Advisor*

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I will not:

1. Openly challenge a family member in front of others about a decision they made.  
I can disagree and discuss issues without being disagreeable and confrontational
2. Get so angry that I walk away or tune out from a family discussion unless we call a "time out" to allow emotions to settle
3. Disregard a decision made by another family member performing in their respective role with the authority defined by their role
4. Go behind the back of another family member with the intention of soliciting support from others to challenge the authority of the other family member
5. Talk about the competence or attitude of another family member with anyone else.  
Family respect will always be the top priority
6. Intentionally withhold information that is relevant to the business from another family member

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Richard Coakley

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Marsha Coakley

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Benjamin Coakley

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Matthew Coakley

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