

CORE VALUES/BELIEFS

(Should/Shouldn't)

Integrity – Embracing what is right even when no one is looking, by choosing to be accountable.

Client experience – Going the extra mile to build valuable relationships.

Teamwork – Proactively provide and request support, knowledge, tasks and ideas from my teammates.

Resourcefulness – Choose communication, creativity, determination, passion, decisiveness, honesty, sincerity, and love.

Enjoy work – Engaged intellectually and emotionally in my work and celebrate with my team.

Our commitments to our clients and our Team:

- Our clients and our Team will be respected and never taken for granted.
- Our clients and our Team will have our utmost Trust. Our whole mission and business operation revolves around building trust with them.
- We will provide loyalty backed by experience. Unlike some larger firms, we will not pass their work on to the intern or unqualified personnel. Each member of our firm is vetted for skill and will apply their knowledge and experience in assisting our clients.
- We will be a dedicated part of the client's team and our team.
- We will act with integrity, honesty and openness in everything we do for our client, with our client, and for and with our Team.
- We will be resourceful. We will choose to be creative, determined, passionate, decisive, and sincere. Recognize not having resources is *not* the problem.
- We will provide positivity in handling any issues that may arise. We want to help make our client's and our Team's life panic-free.
- We will absolutely respect the confidentiality of our working relationship with our clients and our Team.
- We will return phone calls and respond to emails within 1 business day, if not sooner.
- We will meet the deadlines we set. In the case of circumstances beyond our control, we will notify the client and discuss with them immediately.
- Our services will probably not be the least expensive, and rarely if ever, the most expensive. They will, though, always be fair and of exceptional quality and designed to help the client obtain significant value.
- The client has the right to know our fee structure in advance of any engagement.
- The client is the sole judge of our performance. If anything, if we do falls short of their expectations, we welcome a conversation to resolve it satisfactorily for both sides.
- We welcome our client's and our Team's suggestions on how we can improve our working relationship.