

■ *Our Ground Rules*



Planning designs centered on client desires

1. We deliver positive, memorable, and transformational planning experiences.
2. We are committed to clear and accurate communication.
3. We embrace listening as the heart of communication.
4. We honor our commitments and take responsibility for our actions.
5. We are committed to honesty and integrity.
6. We are committed to delivering competent financial counsel.
7. We use technology purposefully and strategically, not as a substitute for direct client contact.
8. We embrace strategic alliance relationships with networking partners.
9. We have fun and seek to embrace a positive attitude.
10. We truly enjoy our time together with our clients.

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