

DEMONSTRATING VALUE TO OUR CLIENTS

Financial Service Group's values are more than words on paper. These terms define what you can expect from us.

Compassion

com-pas-sion We create a "safe" environment where each person is treated with genuine compassion, empathy and respect. We're there during difficult transitions whether it's a visit in a nursing home or showing our support during times of loss or crisis. We celebrate your successes and life transition milestones like graduations, weddings, welcoming children and grandchildren into our extended "family" or helping you plan or recall special events that gathered your loved ones together to share in unique family experiences.

Commitment

com-mit-ment We are authentically and genuinely committed to you and your objectives. We want you to feel you can look to us during times of need and celebration. We meet with you at your home or our office—where ever you feel most comfortable. We participate in conference calls with your service providers from other disciplines and we'll accompany you to your banks, attorneys, or accountants to help make sure you're getting everything you need from your other partners.

Integrity

in-teg-ri-ty Doing the right thing comes to us naturally and guides our decision making. Our commitment to a fiduciary standard is part of our culture, not just a legal or ethical obligation, so you can be sure all actions and recommendations have your best interests in mind. The work we do is done with complete transparency, giving you the added peace of mind that comes from clearly seeing how our business dealings with you are handled.

Excellence

ex-cel-lence We benchmark industry best practices and use innovation and continuous improvement to drive our service to you. Our **Virtual Client Center** allows you to interact with us online and stay current with readily available on-line documents, files, and meeting notes. Our thought leadership in **Career Asset Management**, which recognizes and quantifies your career as an asset class using quantitative and qualitative measures, has been viewed in the industry as groundbreaking work. And our **Caring Conversations** guide intergenerational planning and provide for a facilitated dialogue around some of your most difficult, but critical conversations.

Shared Responsibility

re-spon-si-bili-ty We are accountable and take responsibility for our actions. When a mistake is made, we are not afraid to admit it and assume our share of responsibility in correcting the issue. Internally, this means that each team member is willing to take on their responsibilities while being supported by others. Shared responsibility allows us to improve our service to you and provides the opportunity to improve our processes, service delivery, and/or your experience with us.



Partnering with you
through life's transitions