

1. WE ARE TRANSPARENT



We exhibit radical honesty with both our clients and each other.

- We do not bend the truth or hide a failing – to either our clients or each other.
- We communicate “hard truths,” even when they are uncomfortable, with the intent of helping our colleagues and clients rise to a higher level of performance and results.

2. WE ARE COLLABORATIVE



We coordinate our efforts toward a common goal in the spirit of mutual respect, accountability, shared resources, support, and humility.

- We are “integrators” at heart, always looking for ways to integrate the efforts of multiple stakeholders – both internally and when working with the various components of our clients’ Virtual Family Offices.
- We define our individual success, in large part, by how we help our colleagues grow and succeed.

3. WE ARE CURIOUS



We believe that curiosity leads to excellence and work to cultivate an unceasing thirst for knowledge both internally and for our clients.

- We believe that knowledge is the ultimate competitive advantage, and thus are always growing our knowledgebase, skillset, and the tools in our toolbox... never satisfying for a plateauing learning curve.
- When things don’t go smoothly, or people act in a way we don’t expect, we assume the innocent intent of others and commit to listening to one another openly and generously, seeking always to understand others’ viewpoints.

4. WE ARE VISIONARY



We are creative innovators who are disrupting the wealth management industry by applying innovative solutions to the needs of both our clients and our colleagues alike.

- We look for opportunities to add innovative tools and training to our systems and library of institutional knowledge, because disrupting the wealth management industry is a team sport.
- We challenge the status quo; we challenge other people’s perceived limitations; and we do not settle for “the way things have always been done.”

5. WE HUSTLE TO GSD



We are a team of highly entrepreneurial problem solvers who hustle to grow both our business and our clients’ businesses alike.

- We focus on *results* and recognize others depend on each of our actions. Therefore, we will strive never to let them down. We do not give up!
- We take initiative and do what needs to get done to get results, without complaint, excuses, or efforts to shift responsibility.