

Likely every firm, complex, team and even family has built a culture that reflects the philosophy and core tenets of the people in charge. We have seen more strife, discord and dissolutions occur due to incompatible philosophies and culture than any other business or personal challenge. People who are philosophically aligned and share a common worldview and core tenets are likely capable of sticking together through all kinds of challenges and disruptions.

	Partner 1	Partner 2	Partner 3
Comprehensive Wealth Management: "I commit to incorporating a comprehensive, in-depth, written and ultimately implemented financial planning process with all clients."			
Client Management: "I will segment our clients both quantitatively and qualitatively, and the higher the average assets per client, the fewer clients we will retain."			
Client Engagement: "I will introduce my partners into all my client relationships based on their unique roles and specialization in fulfilling our wealth management approach."			
Client Service: "I am committed to building a truly exceptional and highly personalized client service platform for our platinum-level clients."			
Investment Philosophy: "I commit to collaboration with our team that allows us to work together in a uniform manner. By doing so, it creates cohesiveness within the team's investment philosophies, allows us to create models to streamline investment management, and establishes a succession plan within my asset management that I know our team can pick up where I leave off."			
Financial Professional Compensation: "Once we complete the "dating phase" and become a fully operational team, we will combine all assets under one joint production number."			
Succession Plan: "I commit to the evolution of my role from full-time financial professional to senior emeritus status and ultimately to the retirement timeline that we agreed upon."			
Staff Compensation: "I am willing to bonus support staff members based on their unique critical objectives and growth components."			
Communication and Collaboration: "I will foster an open and collaborative environment through the use of daily huddles, weekly strategic meetings and semiannual developmental meetings."			
Roles and Responsibilities: "I will help establish roles, responsibilities, goals and accountabilities so each team member can potentially play to their strengths and contribute to the overall performance of the team."			
Delegation: "I am willing to delegate tasks and authority (some of which I currently perform effectively) to the appropriate team members so I can remain focused on my critical roles, responsibilities, strengths and objectives through each phase of the succession plan."			
Professional Model: "I am committed to managing a professional practice where client meetings are well-structured, highly systematized and scheduled a week or more in advance."			
Technology: "I will consistently utilize a networked CRM system, a comprehensive planning tool and automated investment management process, each to its full capacity."			