



## Client Relationship Standards

As your Operational Partner (OP), our commitment is to provide reliable, comprehensive, and professional support to you and your clients and understand that our relationship is built on trust and transparency. These standards outline what you can expect from us as your OP and what we need from you to ensure a positive and productive working relationship.

## What You Can Expect from Us

- **Clear Communication & Accessibility:** We will consistently provide regular, transparent updates and maintain prompt response times to you and your clients' inquiries.
- **Fiduciary Commitment:** Like your commitment to your clients, we will always act in the best interests of you and your clients.
- **Proactive Support:** We go beyond the assigned task to ensure every T is crossed and I, dotted. For example, obtaining charitable donation acknowledgement letters, relaying data updates across tech stack, and ensuring cash availability for recurring distributions.
- **Education and Perspective:** Drawing on our many years of experience across various financial planning models, we will stay updated on the latest technology and best practices while actively sharing insights to enhance your operations. We pride ourselves in bringing ideas, opinions and constructive feedback to our clients.
- **Ingenuity:** We will thoroughly research tasks before reaching out with questions.
- **Confidentiality and Security:** Both you and your client's information will be handled with the utmost care and professionalism, always ensuring complete confidentiality.

## What We Expect from You

For us to best support you, we encourage:

- **Active Engagement:** We ask that you commit to no less than bi-weekly check in meetings with your OP. Regular communication is key to maintaining alignment and addressing any potential issues early on.
- **Efficient Requests:** To streamline processes, please use the CRM for all requests. This will help to ensure that all communications are tracked and transparent enabling better organization and response time. We kindly ask that you avoid using email, text, or instant messaging for support related tasks.
- **Commitment to the Team:** Collaboration is a two-way process. Whether it is your first time working with support staff or not, it takes time to understand each other's work styles and preferences. Trust the process, follow through on check-in meetings, and stay focused on the long-term success of the partnership.