



FIRESIDE
FINANCIAL

CLIENT EXPECTATIONS

EXPECTATIONS

- We will provide clear and timely communication.
- Establish a communication schedule based on the complexity of your financial goals.
- Strive to meet investment performance expectations.
- Possess a comprehensive breadth and depth of industry knowledge.
- Put your family before myself or my practice.
- Fully disclose all fees.
- Have a set process for defining, preserving, and achieving your family's financial goals.
- Keep you informed of any events that might impact your family's finances.
- Deliver high-level personal service.
- Fully understand your family's goals and needs.
- Help keep your important financial information organized and updated.
- Gather outside professionals when necessary to help with your particular financial situations.





CLIENT RESPONSIBILITIES

- Be open and honest about your current financial situation.
- Clearly explain your goals and expectations to us.
- Inform us of ALL assets and liabilities so that we can provide you with appropriate recommendations.
- Inform us as soon as possible of any significant life changes within your immediate family. (*i.e. Change of jobs, loss of a loved one, financial benefit, etc.*)
- To ensure the most efficient service possible, allow our team the opportunity to answer any questions you may have.
- Respond to communications and requests in a timely manner.
- Cancel or reschedule meetings as soon as you know of a conflict; best practice is 24-hour's notice.
- Strive to arrive to appointments on time, or even 5–10 minutes early.

IDEAL CLIENT RELATIONSHIP

- Values professional advice.
- Have financial goals and needs.
- Relationship minimum of \$250,000 of investable assets.
- A relationship potential of greater than \$1,000,000.

