



## START WITH WHY

*meeting notes*

*June 24, 2019*

### what we do

- Taxes (Individual, Business, Estate, Trust)
- Financial Planning
- Bookkeeping
- Individual Planning
- Payroll Services
- Wills, Trusts, Estates
- Tax Planning
- Retirement
- Business Consulting
- Litigation
- Insurance (Home, Auto, Business, Employee Benefits, Umbrella)
- Life Insurance
- Long-term Care
- Real Estate Services
- Financial Statements
- Social Security Planning
- Contracts

### how we do it

- one stop shop for our clients
- continuous learning
- protecting our clients' money
- doing the "right" thing, in the "right" way, at the "right" time.
- being problem solvers
- educating and informing our clients
- being experts in our field

### we believe

- in helping others
- in serving people
- providing a good customer experience
- hearing our clients say, "Well Done"
- serving our clients with a happy heart
- in connecting with our clients to form deep relationships
- instilling confidence and hope in our clients

### we value

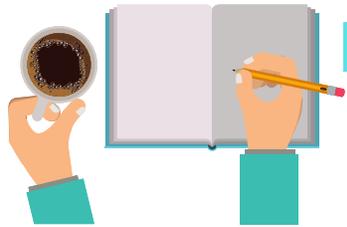
- approachable
- humility
- reliable
- incisiveness
- friendly
- integrity



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### why we do it

- To instill confidence and hope in the future for our clients
- Support our clients in securing a brighter, stronger financial future.
- To challenge the status quo.
- To positively counter the negative perceptions of financial management.
- To build life long relationships with our clients.
- Looking beyond the problems of today and providing solutions for the future.
- To provide our clients with peace of mind.
- Inspire our clients to aspire for greatness in their lives.
- Become a true partner walking alongside our clients as they move through stages of life.
- Leave our clients in a better position than what we found them in.
- To help our clients answer life's "what-if" questions.



### partner homework

1. Read Chapter 3 of "What the Heck is EOS?"
2. Identify two company values you believe we should adopt as a company.
3. Create a one sentence statement to capture "our why" as company.

### partner assignments

- Michelle | Marie | Derric
- Gina | Debbie
- John | David
- Alli | Lisa | Jackie
- Jason | Pat