

The Serve First Philosophy

The Serve First philosophy means that we must approach our clients with all the human understanding possible and with only one desire: the desire to do the best job we can for that client.

We must help our clients to recognize both the problems and the opportunities they face, and to accept the fact that we are the best people able to provide the financial counseling they require.

Our clients will react positively to sincere interest and genuine expertise the moment they recognize them. And they will spot insincerity and incompetence just as quickly.

To embody this philosophy through and through, we must first be fully committed, in all that we do, to “serve first, last and always.” We must believe that there is no such thing as a client relationship out of which we must earn commissions in order to justify the work we have done.

Once we agree to work for our clients, once we commit to take the problems into our hands, we must believe that if we constantly deliver the very best service of which we are capable, without thought of pay when we do what is truly in the best interest of our client, our compensation, in the end, will always take care of itself.

To Strive In ALL
My *Personal* Endeavors
To Serve *More* People *Better*



The Creed

This client's financial affairs are a mess – His family suffers from this mess – It isn't their fault – They think they're in good shape – But someone strong will show them the light – I will be that person – I will inform them – I will focus on their problems – I will look them in the eye and quietly, gently with dignity and singleness of purpose on their behalf, and with a respectful yet persistent manner get them to put the problem into my hands.

I can be trusted with their confidence – I will uncover and identify the problems they face – I will work closely with them to correct the mistakes they have made – Armed with logical reasoning and irrefutable facts, I will make every effort to persist, insist and persuade, until they have put their financial affairs into the best possible order.

As a direct result of my efforts, this family will receive great value from my work and will benefit to the fullest degree from the financial resources they have accumulated during their lives.

As clients of mine — I owe them that.