Prudent Wealth

Client Service Standards

WHAT YOU CAN EXPECT

- We listen and want to hear what you have to say, communication is critical for our relationship to work. We want to talk with you and hear about your dreams. This is the best way for us to help you make it a reality.
- We love our clients. We enjoy working with great people who appreciate the true value of our services.
- We look at all aspects of your life to create an ongoing financial plan that reflects your values, priorities, and resources, as well as uncovers your opportunities.
- We assist you all along the way with the "heavy lifting" process of implementing your plan. We keep track of any pending issues that we have yet to address. We monitor your plan regularly to make certain that all parts stay relevant and updated.
- We do what works, not what is currently popular. We believe in an analytical approach to investing. We do not try to time the markets. If you want to gamble your future based on rumors and hearsay, we will not be a good fit.
- We schedule meetings twice a year (Tuesday's, Wednesday's, and Thursday's) We spend Monday's and Friday's prepping for client meetings, and doing research, so we can be fully present when you are in the office. Our scheduling application is available on our website
- We are highly flexible in both the timing of when we are available and method of communication to make meeting participation convenient for you. Our scheduling application is available on our website, we meet you at our office, over zoom, or by phone.
- We check for phone and email messages regularly and respond by the end of the next business day.
- We will inform you of processing time or changes relevant to your situation.
- We will operate a casual dress code on days there are no client meetings, clients are welcome to "drop by" the office, but we may be in casual attire.

WE ASK YOU TO

- Be respectful to our team members.
- Provide feedback to help us improve our services.
- Be responsive to emails and phone calls within a reasonable period of time.
- Understand that Prudent Wealth will provide advice on investments, selected through their research.

Client Service Standards

WE COMMIT TO

- We strive to do our best on your behalf.
- We will help to direct for you a range of investments that we believe fit our investment philosophy at the best possible price.
- We monitor and review our Client Service Standards regularly.
- We will break down the finances in an easy way for you to understand.
- We keep all our client information confidential, safe, and secure.

2108 Milestone Dr, Ste 202 Fort Collins CO, 80525 | (970) 225- 6169

www.Prudent-Wealth.com | Paul@Prudent-Wealth.com