



C.R.O.W.N.

CARE • Care for clients, team members, family and friends. My actions and attitude will be dedicated and empathetic to helping other people or the cause.

RESPONSIBLE • Responsible for my actions and activities that affect clients, team members, family, and friends. Win, lose, or draw, I am responsible for my part and my team.

OWNERSHIP • Ownership solutions, problems, opportunities, activities, and actions for the betterment of myself, my team and my family. It is mine until the loop is closed.

WILL • Will to work, to grind, to persevere, to lead, to follow, to engage, and to focus, all for the benefit of the client, advisors, and team.

NOTABLE • Notable positive results for the end client and our team. No matter how small or large the task, my efforts and actions ensure positive results.

