

# Vision | Mission | Values

## Our Vision

We believe that when high-impact entrepreneurs have more time and money, they fuel innovation, create jobs, and propel society forward.

## Our Mission

We unlock resources and foster connections to Make Rich Real® for high-impact entrepreneurs and the lives they touch.

## Our Values

### **We are *transparent***

We communicate hard truths to achieve better results.

### **We are *collaborative***

We integrate our efforts to achieve shared goals.

### **We are *curious***

We embrace continuous learning, always striving to grow.

### **We are *visionary***

We challenge the status quo through teamwork and bold ideas.

### **We hustle *to GSD***

We prioritize results, knowing others depend on our actions.

# Core Values

## We are *transparent*

We exhibit radical honesty with both our clients and each other.

We **do not bend the truth** or hide a failing – to either our clients or each other.

We communicate “hard truths,” even when they are uncomfortable, with the intent of helping our colleagues and clients **rise to a higher level** of performance and results.

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## We are *collaborative*

We coordinate our efforts toward a common goal in the spirit of mutual respect, accountability, shared resources, support, and humility.

We are “integrators” at heart, **always looking for ways to integrate** the efforts of multiple stakeholders – both internally and when working with the various components of our clients’ Virtual Family Offices.

We define our individual success, in large part, by **how we help our colleagues** grow and succeed.

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## We are *curious*

We believe curiosity leads to excellence and work to cultivate an unceasing thirst for knowledge both internally and for our clients.

We believe **knowledge is the ultimate competitive advantage**, and thus are always growing our knowledgebase, skillset, and the tools in our toolbox... never satisfying for a plateauing learning curve.

When things don’t go smoothly, or people act in a way we don’t expect, **we assume the innocent intent** of others and commit to listening openly and generously, seeking to understand others’ viewpoints.

# Core Values

## We are *visionary*

**We are creative innovators who are disrupting the wealth management industry by applying innovative solutions to the needs of both our clients and our colleagues alike.**

We **look for opportunities** to add innovative tools and training to our systems and library of institutional knowledge, because disrupting the wealth management industry is a team sport.

We **challenge the status quo**; we challenge other people's perceived limitations; and we do not settle for "the way things have always been done."

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## We hustle *to GSD*

**We are a team of highly entrepreneurial problem solvers who hustle to grow both our business and our clients' businesses alike.**

We **focus on results** and recognize others depend on each of our actions. Therefore, we will strive never to let them down. We do not give up!

We **take initiative** and do what needs to get done to get results, without complaint, excuses, or efforts to shift responsibility.