

## SERVICE VALUES AND TEAM PROMISES

### DYNAMIC DIRECTIONS CREED

*Dynamic Directions is a place where the genuine care and comfort of our client's goals and dreams is our highest mission. We pledge to provide the finest personal service and quality coaching and consulting for our clients who will always enjoy a warm and comfortable approach.*

*The Dynamic Directions experience enlivens the client's confidence in their personal and practice dreams, instills a feeling of financial well being and fulfills even the unexpressed wishes and needs of our clients.*

#### Four Steps Of Service When Advisors Are In The Office

1. A warm and sincere greeting. Use the client's name.
2. Offering of food and beverage.
3. Anticipation and fulfillment of each client's needs.
4. Fond farewell. Give a warm good-bye and use the client's name.

#### Service Values: I Am Proud To Be Dynamic Directions

1. I build strong connections and relationships to create Dynamic Directions clients for life.
2. I am always responsive to the expressed and unexpressed wishes and needs of our clients.
3. I understand my role in achieving the desired outcome for our clients and Dynamic Directions.
4. I continuously seek opportunities to innovate and improve The Dynamic Directions experience.
5. I own and immediately resolve client problems.
6. I create a work environment of teamwork and lateral service so that the needs of our clients and each other are met.
7. I have the opportunity to continuously learn and grow to build my competencies in the areas of coaching and consulting to better serve Dynamic Directions' clients.
8. I am involved in the planning of the work that affects me.
9. I am proud of my professional appearance, language and behavior.

#### The Team Promise

At Dynamic Directions, our team is the most important resource in our service commitment to our clients. By applying the principles of trust, honesty, respect, integrity and commitment, we nurture and maximize talent to the benefit of each individual and the company.

Dynamic Directions fosters a work environment where quality of life is enhanced, individual aspirations are fulfilled, and individual skills are strengthened.

"At the end of the day, see your life through the eyes of a bull."