Parsons FINANCIAL GROUP

CLIENT SERVICE PLEDGE

We are part of your team and join you in navigating your way towards attaining your lifestyle and financial goals. Together we can develop and maintain a long-term strategic plan that is suitable for your unique goals. This Client Service Pledge outlines our commitment to you as well as what we require in return so together, we can succeed in achieving your goals.

PORTFOLIO REVIEWS

The foundation of our business is understanding our clients needs, families needs, goals, values, and aspirations. Through this, we work with you to effectively establish a plan that ensures we are on track to meeting these goals. Our process starts with the Initial Client Discovery meeting, where we work with you to identify your life and financial goals. During this meeting, we require you to provide us with all the information we need in order to provide the best advice. The information gathered during this time helps us work together to establish a strategic plan that is suitable to your unique needs. After this, it is imperative that we meet regularly to discuss any changes that may have occurred that affect your current financial situation and future goals. Our commitment is to meet with you annually (or earlier should there be a material change to your situation) and is crucial to ensuring that together we stay on track.

RANGE OF SERVICES

Together with our trusted specialists, we ensure that all aspects of your financial and personal affairs are looked after. These strategic partners are used when you need help in an area outside of our expertise, they run their business independently and we do no receive commission or referral fees. The range of services that we provide or facilitate are listed below:

- ☐ Retirement Planning
- ☐ Risk Management, Insurance
- ☐ Travel Insurance
- ☐ Tax Planning and Preparation
- ☐ Educational Planning
- ☐ Estate Planning, Wills and Powers of Attorney
- ☐ Trusts and Charitable Giving
- ☐ Multi-generational Financial Planning
- ☐ Asset Management

SERVICE

We take pride in our personal service and dedication to servicing our clients. Know that we are always available and committed to supporting you. In the rare event that you call the office and no one answers, please leave a message and rest assured that we will return your call within a couple of hours.

iA Private Wealth™

Parsons
FINANCIAL GROUP

<u>YOUR TEAM</u>

Here to empower you in pursuit of your lifestyle goals is a team of individuals committed to meeting your needs. In order to retain our professional designations, our regulators require that each of us complete a minimum of 25 hours of continuing education annually depending on our designations. In addition to this, we regularly attend meetings and conferences either in person or through webinars in order to keep up to date on the everchanging complexities of the industry.

Your team consists of:

Katherine Parsons
Christine Farnham
Maya Vogel
Giovanna Graci

<u>CLIENT EDUCATION</u>

We have access to a wealth of information and expertise from professionals. Knowledge is empowering and we enjoy sharing this with our clients. We recognize that not everyone is interested, but if you are, we provide many interesting articles via our website and social media.

Website: parsonsfg.com
Facebook: @parsonsfg
Twitter: @kparsonfg

We have offered several educational events, in the past having included the "Psychology of Retirement" and "Estate Planning". Additional to this, we offer several client appreciations events to celebrate the relationships we've built over the years.

<u>CLIENT COMMUNICATION</u>

Above we have outlined our service commitment to you as we join you in navigating your way towards attaining your lifestyle aspirations and sustained financial success. In this way, as our fellow team member, we require you to provide us with all the information we need in order to provide the best advise. If your financial or life situation changes, as it inevitably will over time, we expect that you will let us know so we can review how it effects your plan and provide recommendations where necessary. We encourage you to ask questions and address any concerns you may have so that you are comfortable with your portfolio and the relationship we have built.

iA Private Wealth™