

# Resonate Inc.'s Client Bill of Rights

We consider our relationship with our clients to be a partnership. Therefore we believe that you have certain rights and responsibilities if you choose to work with us.

**You have the right to:**

## **CHOOSE YOUR ADVISOR**

Select and work with a trustworthy, independent financial advisor who is held to a fiduciary standard, is committed to stay professionally current and competent and is personally dedicated to putting your interests before his or her own.

You may request information about your advisor's experience, work history and background.

## **QUALITATIVE AND QUANTITATIVE PLANNING**

Expect holistic planning – integrating the qualitative conversations with the quantitative precise technical aspects of planning.

Be fully participative in the planning process.

Invite other advisors to collaborate when appropriate.

Invite family members to any meeting at any time.

## **CLEAR AND TIMELY COMMUNICATION**

Be listened to carefully and as objectively as possible.

Have complicated financial concepts explained in as simple or complex terms as you prefer.

Answer your questions in an understandable way.

To expect ongoing planning and investment recommendations based solely upon your unique needs, goals and dreams which are consistent with the objectives of enhancing your financial well-being and providing peace of mind.

## **CONFIDENTIALITY**

Expect the strictest levels of confidentiality with information you provide to the Resonate team. We follow the highest regulatory standards.

## **TRANSPARENCY**

Receive full disclosure on how we are paid.

## **BEST EXECUTION**

To expect the best execution in all that we do. This means all transactions will be timely, precise and completed as promptly as possible.

## **EXEMPLARY SERVICE**

Expect to have your calls and emails returned within one business day (or sooner if the matter is time sensitive).

Have any error acknowledged and corrected without delay; have any complaints addressed quickly and thoroughly.

Receive honest recommendation and feedback - even if it's difficult to discuss.

Be treated with the utmost courtesy and respect at all times.