

# CLIENT CHARTER

## OUR CLIENT SERVICE MISSION

At Mercurio Wealth Advisors, our clients are our top priority. We pride ourselves on engaging in a professional relationship where you feel we are providing you with a valuable service but also strive to make you feel like family. Our services are always conducted with honesty, integrity, and your future in mind.

## CONTACTING OUR OFFICE

One of our dedicated team members (not a recording) will answer your call Monday-Thursday from 8:30 a.m. to 5 p.m., and on Friday from 8:30 a.m. to 4 p.m. Should you call after business hours and leave a message, we will return your phone call within 24 hours.

## RESPONSIVENESS

When you have questions that need to be answered or need information, we pledge to get back to you within one business day either with answers or a timeframe in which we will be able to gather that information. We will make every attempt to be responsive to and proactive with your needs. If at any time we fail to live up to your expectations, please let us know immediately so that we may correct the situation.

## PRIVACY AND CONFIDENTIALITY

Here at Mercurio Wealth Advisors, we understand the need for discretion and keeping your personal information private. We vow to treat any information you leave with or provide to us as private and confidential to our company. Your information will only be shared with our associates in the capacity necessary to effectively and successfully manage your account(s).

## PERSONAL ACCOUNT MANAGEMENT

We will provide a clear and easy-to-understand summary of your portfolio at each review (by phone or in person). This summary can also be provided at any time, upon request. We pledge to make any financial transactions you need as easy and convenient as possible.

If you feel that we can improve in any aspect of the service we provide, please let us know. We always welcome comments and suggestions on how we can better serve you, our clients.

You deserve nothing but the best!

**Contact: Ashleigh Dennison, Client Relationship Manager**

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