

Flourish Wealth Management® - Core Values

- Bring excellence and heart in everything we do
- Make a difference
- Grow and share our experience and insights
- Take initiative and be resourceful
- Appreciate, Celebrate!

Flourish Principles - Culture Snapshot

Love what you do! Come motivated and bring your positive energy Heart, humor, fun, can laugh at yourself! Curiosity and passion – pay attention to the clients, firm, team members and broader community. Strive to understand their needs and take your opportunity to make a positive impact. Don't put off what can be done today: Take short-term discomfort for long-term gains Mistakes will happen, own them, fix them, and share the learning. Honor internal meetings Direct communication with each other: openness, transparency and, above all, honesty Assume the best intentions of each other Question premises and strategy Bring your best, most accurate and timely work Keep your promises & over-deliver on projects and deadlines Problem solving by recognizing and taking action Stretch & Learn - step out of your comfort zone and try new things Celebrate the small victories and big wins - Expect your teammates or others to motivate you workelf! Expect your teammates or others to motivate you motivate you motivate you motivate you self-centered, guarded, easily offended and overly-sensitive Ignorance, lack of empathy, deferring to others to make it better Recognizing and ignoring an opportunity to improve the firm. Waiting for others to make it better. Deception, cover ups, not owning mistakes Recognizing and ignoring an opportunity to improve the firm. Waiting for others to make it better. Deception, cover ups, not owning mistakes Becognizing and ignoring an opportunity to improve the firm. Waiting for others to omke it better. Deception, cover ups, not owning mistakes Recognizing and ignoring an opportunity to improve the firm. Waiting for others to omke it better. Deception, cover ups, not owning mistakes Becognizing and ignoring an opportunity to improve the firm. Waiting for others to omke it better. Deception, cover ups, not owning mistakes Pecption, cover ups, not owning motivation of thems to combine it permissing the time of others. Deception, cover ups, not owning mistakes Deception o		- Culture Shapshot
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