



**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**

<b>What Works</b>	<b>What Doesn't</b>
Love what you do! Come motivated and bring your positive energy	Expect your teammates or others to motivate you
Heart, humor, fun, can laugh at yourself!	Self-centered, guarded, easily offended and overly-sensitive
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.	Ignorance, lack of empathy, deferring to others to make it better
Don't put off what can be done today: Take short-term discomfort for long-term gains	Recognizing and ignoring an opportunity to improve the firm. Waiting for others to make it better.
Mistakes will happen, own them, fix them, and share the learning.	Deception, cover ups, not owning mistakes
Honor internal meetings	Not coming prepared or respecting the time of others
Direct communication with each other: openness, transparency and, above all, honesty	Gossip or talking behind one's back
Assume the best intentions of each other	Negativity and blame
Question premises and strategy	Don't question goodwill, effort or intent.
Bring your best, most accurate and timely work	Expect others to monitor your work quality and deadlines
Keep your promises & over-deliver on projects and deadlines	Letting others down: If you can't make a date, tell us early and often. A well prepared Plan B is a better strategy than hope.
Problem solving by recognizing and taking action	Complaining and not offering up ideas
Stretch & Learn - step out of your comfort zone and try new things	The "status quo", complacency, mediocrity
Take time off and get your work done: communicate and honor your commitments	Take time off and rely on others to complete your work
Celebrate the small victories and big wins - personally and professionally	Leading with negativity and pessimism – check it at the door