

# Our Client Service Promise

Your Family, One Office, You First™



**BUSINESS HOURS:** Our regular business hours to serve you are Monday to Friday 9am to 5pm. We are often available a bit earlier in the morning when needed. When things are quiet and calm on the odd Friday, we may all start the weekend a tad early to be with our families. We do realize in this ever so technical and accessible 24-hour world, that you may have an inquiry or need arise outside of these traditional hours and in this regard, our whole team will make an effort to respond as timely as we can.



**OFFICE VISITS:** If you come to our office, we promise to greet you with a big smile and open arms. Ok, well perhaps not such open arms in these recent years but with that said, we have and always will follow health and safety protocols as established by our provincial authorities. In our current “hybrid” office model, our commitment will always be to have at least one team member available to greet and meet with you in our office location during our stated regular business hours, Monday to Friday. In order to provide the best service possible, we do ask that any and all meetings at our office location are previously scheduled and are by appointment only to ensure that we can attend to you and your needs specifically.



**PHONE CALLS:** When you call our office, we always make every effort to have a live team member answer your important call. You will never be put on a lengthy or endless hold. We all have direct dial lines but any team member can answer and assist. If you leave a detailed voicemail message because we are already on our lines or are with another valued client, our promise is to make every effort to return your call the same day. If that is not possible, we commit to getting back to you well within 24 business hours. All voicemails are kept strictly private and confidential.



**VIDEO CALLS:** All video calls are made by invitation and appointment only.

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Products or services related to investments, investment recommendations, financial planning, retirement planning, and investment reviews are provided through our mutual fund dealer Security Financial Services & Investment Corp.  
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**EMAILS:** When you email our office, we make the same commitment as when you call; we aim to respond before the end of the same day. If any particular day is busier than normal, we are still committed to responding to you within at least 24 business hours. All emails are kept strictly private and confidential.



**TEXTING:** For both privacy and compliance concerns, we ask that you please refrain from contacting our office through any form of text or instant messaging. For your protection, we will not be able to respond or reply back to you by text. In certain instances, if texting is your only option to contact us, we will respond by email and/or phone.



**SOCIAL MEDIA:** We simply share notices and educational material here. For both privacy and compliance reasons, we are unable to chat or instant message over social media similar to texting.



**ONLINE CHAT:** Facilitated through our website, our chat is a convenience extension with an initial notice to our emails so please be a tad patient as it is not an immediate instant messaging service since we don't tend to ever experience time sensitive emergencies. You are more than welcome to always call for a live team member or simply wait for our response.



**RESPECT & INTEGRITY:** We promise to always make your time and your situation a priority. We are here to serve your needs in a respectful and dignified manner. Trust and integrity are everything and we embrace these values wholeheartedly. Our team will always be respectful and we appreciate a reciprocal approach. We do not take your trust lightly and in fact express our sincere gratitude for extending such to us.

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