



# Team Pledge

Principles of AdvicePeriod



## We set the bar for the industry.

In an industry where walking out on employers without notice, jockeying for clients, and poaching employees are generally accepted practices, AdvicePeriod team members operate with honor and integrity. This is who we are, and we welcome like-minded people to join our team.

## Working under principles of which we are proud.



### Excellence

We conduct ourselves with honor, holding ourselves to a standard higher than the industry.



### Integrity

We are good citizens, treating others as we would like to be treated. We do not negative sell.



### High Standard

We work with others who think like we do and hold our entire team to a high standard.

## Everything Is a Choice

### Things we don't do



We don't violate our legal agreements with our prior employer, and we aren't bad leavers.



We don't raid clients or employees from our previous employer.



We never take confidential information in any form.

### Things to which we commit



We give notice and transition responsibilities in a reasonable manner when exiting.



We do let clients and COIs know we joined AdvicePeriod and that we will answer any questions honestly.



AdvicePeriod team members are proud of how they handle themselves and demonstrate professionalism.

