STRATEGIC
RETIREMENT SOLUTIONS

Retirement Planning With
Direction, Confidence & Clarity

250 International Pkwy, Suite 134 • Lake Mary, FL 32746
(407) 478-1599
www.StrategicRetirementSolutions.com

Purpose, Values & Service Standards

Plan Well. Protect Well. Retire Well.

Our Purpose

Strategic Retirement Solutions exists to properly educate and empower people to make intelligent decisions on how to save, grow, and protect their money — so they can enjoy a confident, worry-free, and comfortable retirement.

Fact-based, common-sense solutions with measurable, proven results.

You're in control. No surprises. No fine print. No excuses.

Imagine: More Money, More Time, More Peace of Mind!

The simple truth is, you deserve better — believe in better!

Let's get to work.

You worked hard for your money; we will work even harder to protect it.

Our Service Standards

We have decided that, without exception, we will:

- Ask questions and listen to our clients in order to fully understand their needs.
- Create retirement and wealth solutions that complement our clients' overall financial strategy and allow them to most effectively accomplish their short- and long-term financial goals.
- Be sensitive to client concerns regarding their wealth creation and preservation plan. We will earn their confidence as their trusted retirement and wealth architect.
- Respect our clients' time, minimizing their personal effort by applying our knowledge and experience with state-of-the-art technology, complemented by our service and resourcefulness, while making necessary adjustments so that we never overwhelm our clients.
- Show up on time, prepared, and ready not just to hear but to truly listen.
- Communicate regularly and proactively with our clients to keep them informed on the status of their plan, thereby reducing the stress associated with uncertainty.
- Measure our success by our clients' willingness to consistently recommend us to family, friends, and co-workers.

- Take full responsibility for our actions and be honest at all times. We will always take the high road when providing solutions — always running toward challenges, never away from them.
- Seek to improve the quality of the service we provide by encouraging each client to critically evaluate our performance — what we can improve and what we did well.
- Be responsible for how the client is treated and place that responsibility on no one else. We are accountable for the experience and the outcome.
- Serve our clients the way they should be served, or help them find a viable alternative.
- Do what we say and finish what we start — every time, without exception.
- Say please and thank you, from the first person on our team to the last, all the time, every time.
- Remember that client service is a philosophy, not a department.
- Strive to honor God in all we do.

Our Team Values

- To honor God in all we do.
- To build the strength and efficiency of the organization and the people within it.
- To always be prepared and to show up on time, ready to hear and to listen.
- To do what we say — every time, without exception.
- To finish what we start — every time, without exception.
- To say please and thank you, from the first person on our team to the last, all the time, every time.
- To care for and serve our clients before profit.
- To create a raving-fan “WOW” experience.

Our Culture

As a team, we must create and foster a culture that is:

- Life-plan driven.
- Client focused.
- Goal- and results-oriented — proactive.
- Concentrated on solutions.
- Driven to build, acquire, and maintain new and exciting client and strategic-partner relationships.
- Open and accepting of new ideas and of each other.
- Able to see, create, and welcome change.

Our Consummate Goal

We will change people’s financial and personal lives. We will be the most recognized and most trusted retirement and wealth architects in the markets we serve.

Our Envisioned Future

Strategic Retirement Solutions will be known as the top retirement and wealth architects in the markets we serve. We will employ only proactive professionals who are excited and passionate about helping others succeed. We will impact our clients’ lives with top-of-the-industry advising on comprehensive retirement and distribution planning. Coordinated, distribution-focused retirement planning will continue to be the best method for securing the ultimate financial future for our clients. We have created a system that enables the team to meet and exceed our clients’ expectations. Building lifelong relationships and providing unmatched value for our clients and strategic partners is our focus. We will be a 100% referral-based, profitable company.

Our people, their families, clients, and partners will experience a difference because of the value we add. We will foster participatory management. The team will have the ability to make decisions, and leadership will operate from a “what is needed” stance with a servant attitude and focus. The team will have what it needs to “Make It Happen!” Only motivated professionals who are alert, curious, results-driven, and resourceful are able to reach their targets and exceed expectations.

The entire team will concentrate on solutions, not on problems. Our team will be the most educated team in our specialty area, delivering unmatched value. We will continue to address the need for people to learn the value of comprehensive retirement and distribution planning and its impact on their financial future. We will continue to address the necessity for people to learn the value of proper wealth creation and preservation planning and its impact on their financial future.

Our Unique Ability

Investing in the well-being of others through strategic planning and innovative solutions — to serve and transform personal and financial lives.

OUR OFFICES

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