

Resource Consulting Group – Core Values  
November 2009

When asked during an annual planning retreat to identify the core values of our firm, our staff members' responses fell into four major categories: Integrity, Quality, Compassion and Work/Life Balance.

**Integrity:**

Our firm is consistent in what we say and what we do in our interactions with clients, other professionals and staff.

We work hard to gain and keep our clients' trust by serving in a fiduciary capacity and putting their interests first.

We treat our clients and staff members with respect, and we hold them to the same standard.

**Quality:**

Our systematic processes, combined with our academic-based investment strategy and educational approach to the financial process, enable us to deliver the highest quality product to our clients.

We encourage our staff members to obtain the education and experience they need to perform at the highest level.

**Compassion:**

We believe in giving back to the community and through the establishment of a donor-advised charitable fund, the firm, our clients and employees are able to contribute to their favorite charities. Additionally, staff members regularly participate in firm-supported community events. We encourage our employees to get involved in community service projects by providing a half-day off each quarter for this purpose.

We make every attempt to reduce waste and conserve resources by participating in recycling and using electronic communication whenever possible.

**Work/Life Balance:**

We encourage and strive to provide the same life balance for our staff members as we do for our clients.

Our prime directive, "fostering our clients' peace of mind", incorporates all of these core values and sets the standard for client service for all of our staff.