



Commitment to Excellence: Team members of Strategic Insurance

Following our Core Values:

Excellence- *Give your best in all situations. Commitment to being the best and delivering the best from a sales and services perspective.*

- Continuously strive to learn
- Work hard
- Learn from you mistakes
- Admit your mistakes
- Ask questions when you do not know the answer
- Be positive

Integrity- *Do the Right Thing Always...the quality of being honest and having strong moral principles*

- Act with honesty at all times
- NEVER sign any documentation for a client
- Show respect and empathy for others
- Say what you mean and mean what you say
- Be accountable for your actions
- Be honorable & wise in your handling of client's personal information including checks, money, credit card information.

Service- *Treat others as THEY would want to be treated.*

- Communicate with our clients according to their desired preference
- Provide the best option available to our clients by thoroughly researching the marketplace
- Educate our clients
- Put ALL client correspondence and documentation in the client file
- NEVER answer a question when you are not certain of the answer
- Set clear and realistic expectations and timeframes
- Keep your word
- Listen, Empathize, Ask & Resolve when dealing with clients.

Date: _____

Team Member Signature _____