



GRIT & LAVENDER FINANCIAL PLANNING CORE VALUES

Integrity & Ethics

We will be honest, respectful & always do what is right. We will always respect your privacy & act with the highest duty of care when handling your financial matters.

Transparency & Fiduciary Standard

We vow to be transparent in our fee structure & always uphold our fiduciary oath to always put our client's interest ahead of our own.

Collaborative & Professional

All of us working together, in a professional environment, to help our clients reach their goals. We are happy to bring in trusted resources anytime a situation exceeds our current knowledge base

Authentic & Human

We will authentically meet our clients where they are today & ensure our clients are always recognized as real people, not just an account number or balance

Care & Connection

We care about well-being of everyone in our circle & know that connecting with those around us in a meaningful way will enhance our entire relationship

Innovation & Creativity

We pledge to disrupt the traditional way people work with financial professional & think outside of the box. We continuously strive to improve our process, client experience & approach to deliver the best possible experience for all

Service & Community

We employ a client's first mentality in all that we do. We will anticipate needs, encourage dialogue, & support our clients in living their ideal life. We also emphasize the value of community involvement by proactively engaging & connecting with those around us.