



Client Service Pledge

What Our Clients Can Expect From Us...

1. We will know you.
 - We will make it our business to know you and understand what matters to you. We will listen to you and ask carefully selected questions until we understand what is important to you.
2. We will plan and implement with you.
 - We know that clients differ in their wealth and life experiences. We meet you where you are. Then we offer the capacity and experience to create solutions with you.
3. We will treat our relationship as if we were the client.
 - We will work with you to oversee your costs. Our team will collaborate effectively to provide the right resources- delivering the highest quality of service on time and in the most cost effective manner.
4. We will be available when you need us.
 - We recognize that you may need to make swift decisions and act quickly. We are here for you when you need us.
5. We will communicate often.
 - Our goal is that you will never be surprised about anything we are handling. We will provide regular updates including significant developments via newsletter, special mailings and posts to our website.
6. Your peace of mind will be our top priority.

What Our Clients Can Do To Help...

1. We ask you to share with us.
 - The more we know about your goals, values and beliefs, the better equipped we are to help you attain them. As you experience life changes, we ask that you tell us so we can continue to meet your expectations.
2. We want to know your preferences for working with us.
 - We ask you to tell us your preferred methods of communication and anything else that is important to you, so that we can deliver our service the way you want it.
3. We need your feedback.
 - We want your feedback so that we can continue to meet and exceed your expectations.

Fee-Based Planning offered through Resonate Advisors, Inc. a State Registered Investment Advisor
Securities offered through ValMark Securities, Inc., Member FINRA, SIPC.

Third Party Management offered through ValMark Advisers, Inc., a SEC Registered Investment Advisor.

130 Springside Dr., Suite 300, Akron, OH. 44333, 800-765-5201. Resonate, Inc. is independent of ValMark Securities, Inc. and ValMark Advisers, Inc.