MARCUM WEALTH

CLIENT SERVICE STANDARDS

At **Marcum Wealth**, we strive to enrich our clients' lives through unparalleled service experiences. Marcum Wealth's client service standards place what our clients value most at the heart of how we partner with you to help you succeed. Here is what you can expect from Marcum Wealth:

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PRIORITY | *Your goals are our priority.*

We care about your goals and strive to help you achieve them. We begin by taking the time to understand your unique objectives and circumstances so that we can customize recommendations specifically for you. Because we look out for your best interests we will offer you proactive ideas, stay in touch with you about your needs, and work to develop a lasting and collaborative relationship with you.

RELIABILITY | *You can count on us to be here when you need us.*

You can depend on your Marcum Wealth advisor to be reliable, responsive, and accessible to you. We commit to answering your questions, fulfilling your request, or simply setting a time to talk with you when you need us.

CONFIDENCE | *You can have peace of mind knowing we are in your corner.*

We know investing can be both thrilling and overwhelming. Market trends can be unpredictable and economic conditions are ever-changing. That's why we not only educate you on the strategy behind our recommendations, but we guide you through our process to remove uncertainty so you feel confident in our investment approach.

PERSONALIZATION | *Your preferences drive how we support you.*

We aim to understand your perspective and unique preferences so we can provide you with the experience you deserve. This means we will get you the information you want, when you need it, in the way you wish to receive it. All of our communication is transparent and clear so you know the progress we've made toward achieving your goals.

TRUST | *Your trust is the foundation of our partnership.*

We endeavor to earn your trust from the first moment we meet and work every day to uphold it. We never take the responsibility of effectively managing your wealth lightly, and are honored to guide you on your financial journey.