

## **Our Philosophy**

A corporate philosophy starts with core values. For a firm to have long-term viability it must adhere to its core values at all times. Integrity, professional excellence, concern, sensitivity and diligent oversight are The Monitor Group's core values. Our corporate philosophy is also apparent in our corporate mission: to develop ongoing intergenerational financial security by partnering with our clients to make sound, objective financial and investment decisions.

We have an ambitious willingness to work hard, counterbalanced by a low-key, practical approach with pragmatic advice allowing you to live the life to which you are accustomed. You have worked hard developing your own career. Professional investment knowledge is not your principal vocation - it is ours.

Our corporate philosophy extends to our work. Our financial planning process develops a comprehensive strategy meeting the long-term dreams and goals of our clients. Much like the strategy of a chess match, we focus on the end result, not the short-term gain. By developing personal relationships and understanding the underlying issues, we have successfully helped many people just like you meet their goals.

To accomplish financial goals takes careful planning by professionals who have experience in financial investments, retirement planning, tax analysis and planning, and estate planning. Once a plan is laid out specific to a client's needs and goals, careful monitoring is required to make sure things are on track. Our services are continuous and responsive because laws, circumstances, and the economic environment are constantly changing. Our corporate philosophy can also be seen in our actions. Accessibility, responsiveness, experience and expertise are how The Monitor Group Inc. "Oversees the Accomplishment of Your Financial Future."