

# Client BILL of RIGHTS

We greatly appreciate your patronage. Our company is dedicated to delivering exceptional services while ensuring industry-leading customer satisfaction. We are committed to adhering to all relevant regulations and standards to protect your sensitive information and maintain compliance. This commitment includes implementing robust security measures, conducting regular audits, and maintaining a comprehensive incident response plan to ensure your experience with us is both safe and satisfactory.

A large part of our business comes from referrals from happy, satisfied clients. We want you to recommend us, and we know that you will only do this if you are happy with the services we provide. That is why we work so hard to go above and beyond the call of duty.

The establishment of our Client Bill of Rights, along with our continual and substantial investment in people, processes, & technology clearly demonstrates our commitment to our clients.

## YOU HAVE A RIGHT

- To expect and demand complete satisfaction from the services you receive. We pledge to deliver exemplary service, on time and within your budget, while ensuring compliance with industry regulations to protect your interests.
- To get answers to your questions in PLAIN ENGLISH. We pledge to recommend options for accomplishing your objectives and will answer your questions in terms that you can understand, including clear explanations of our compliance and cybersecurity measures.
- To expect our organization to sustain the highest levels of personal accountability, professional commitment, and employee empowerment in every interaction. We pledge to treat you with the utmost levels of courtesy, responsiveness, integrity, and respect, and to work with you to ensure that your relationship with us is a pleasant and cooperative experience.
- To expect us to lead the way in fostering and implementing innovation and creativity in our service offerings through an unyielding commitment to providing the best services possible, including adherence to best practices in compliance and cybersecurity.
- To individual attention and dedication. We pledge to provide prompt, courteous, and efficient service by acknowledging your request within an hour, keeping appointments, and maintaining great communication, all while ensuring your information is secure.
- To understand every aspect of our business policies and support procedures. We pledge to make it easy for you to communicate with our staff and to receive answers to any questions you may have about how or why decisions, recommendations, or resolutions are made, including our compliance protocols.
- To receive the best value in our services in return for placing your trust in us. We pledge to explain all of the costs up front so that there are no hidden fees or unexpected costs later on, ensuring transparency in our compliance practices.
- To have us attend to the details of each issue, question, and request you have. We pledge to get the job done right the first time while maintaining compliance with all relevant regulations
- To know the status of your requests, no matter what time of day or night. We pledge to provide secure access to updates and status reports 24/7 and to communicate the progress of resolving any issues while ensuring the security of your information.
- To a single point of contact for all your concerns. We pledge to help with any issue you may have, including providing guidance on compliance and cybersecurity matters related to our services.