

# Core Values Statement

## OUR GUARANTEE: LIFE IS BETTER WITH US ON YOUR TEAM

### ***Valued clients, co-workers, partners, and friends,***

*Our company exists with a profound purpose: to lower suffering and empower our clients. When approached with care, clarity, and skill, one's financial life can become a source of empowerment and self-discovery, rather than stress and anxiety.*

*By joining expert wealth services with mindful awareness, we aim to help people relate to their financial lives in a way that reduces struggle and supports a joyful, meaningful life. We believe that money and finance have great power in the world today, and therefore, great potential to be used for good.*

*The following eight core values define how we show up for our clients, for one another, and for the broader world:*

Caring | Protection | Presence | Precision | Forethought | Bravery | Delight | Service

## 1. Caring

At MIFI Wealth, caring for human needs is fundamental to who we are and how we work. Our company is successful when our clients and co-workers feel genuinely cared for. When people are supported, they gain confidence, clarity, and a sense of empowerment — outcomes we intentionally seek for those we serve. This value extends to integrating care for a sustainable future and a healthy society. Caring directly serves our company purpose: to lower suffering and empower our clients.

## 2. Protection

We are committed to protecting our clients and always acting in their best interest. Our clients rely on us, and we take that responsibility very seriously. Our expertise and experience is the primary source of how we protect our clients. When people know that we have their back, it fosters trust and relaxation.

## 3. Presence

Presence allows us to be authentic and fully engaged with clients and colleagues. By bringing mindful, open, and non-judgmental awareness to our work, we reduce unnecessary emotional stress and create space for wise decisions. This allows us to see other perspectives, avoid blind spots, and respond thoughtfully rather than reactively.

## 4 Precision

Precision means that details matter - always. Small oversights, shortcuts, or ignored data points can create significant problems over time. We believe that doing things carefully, correctly, and thoroughly is essential to long-term success. In our client interactions, small acts of care, follow-through, and personalization can make a meaningful difference. By honoring the little things, we build quality, reliability, and trust.

## 5 Forethought

Exceptional service requires thinking ahead. Simply solving the question at hand is often not enough. The first answer frequently leads to more questions. We strive to anticipate cascading questions, see downstream impacts, and bring complete, well-considered solutions. By delivering thoughtful, complete answers, we increase efficiency, build trust, and lighten the load for our clients and teammates.

## 6 Bravery

Money matters create opportunities and problems, both of which can be intimidating. We encourage bravery in ourselves and our clients, particularly with regard to the willingness and ability to speak openly. To be successful investors and advisors, we have to take some risks and be direct and honest communicators. By engaging with mindfulness practices we foster a gentle, but firm approach. In doing so, we can better understand our thought processes, habitual patterns, and unique qualities to improve our outcomes.

## 7 Delight

Our work and our workplace should reflect an uplifted and joyful approach. Professionalism does not require us to be conventional or impersonal. We believe that warmth, creativity, and genuine human connection belong in excellent service. Simple and thoughtful gestures that show personal awareness can mean a lot. By supporting one another, and bringing a spirit of fun to our work, we make the journey lighter and more rewarding for everyone involved.

## 8 Service

Service is the lens through which we view our work. We are service professionals, and our success depends on our ability to put ourselves in another's shoes. Understanding the true outcome a client is trying to achieve is essential—it is not enough to solve a single issue if the deeper goal remains unmet. A service mindset calls us to empathy, humility, and a willingness to go beyond what is strictly required.

**Together, these eight core values guide our decisions, shape our culture, and express our commitment to our clients, our colleagues, and the broader community. By living these values each day, we work toward a brighter future.**