



## Cherry Bekaert: Guiding Clients Forward

# Our 5 Client Commitments

### Why Cherry Bekaert?

Everyone at Cherry Bekaert plays a critical role in exemplifying our Firm mission:

*"To make a difference for our people and our clients."*

The primary way we make a difference is to focus on **how** we serve you, not just what we do for you.

Each day we strive to embody our shared values to provide a unique and fulfilling client experience that adds value to your organization or personal situation and exceeds your service expectations. Our shared values:

- ▶ Uncompromising Integrity
- ▶ Mutual Respect
- ▶ Passion for Excellence
- ▶ One Firm

In addition to our shared values, we are incorporating Our 5 Client Commitments in how we serve you.



**Make It Easy**



**Keep Our Promises**



**Anticipate Your Needs**



**Consider Your Interests**



**Work as a Team**

<p><b>Make It Easy</b></p>	 <ul style="list-style-type: none"> <li>▶ We will adapt our communication to what fits best for you, our client: in-person meetings, video conferences, phone calls or electronic communications.</li> <li>▶ We will work proactively with you to plan the most efficient yet effective use of the time we spend with you or at your location.</li> <li>▶ We will keep things simple.</li> </ul>
<p><b>Keep Our Promises</b></p>	 <ul style="list-style-type: none"> <li>▶ We will establish expectations with management, executive leadership and the Board of Directors, and meet our commitments.</li> <li>▶ We will put together a detailed timeline for service delivery, keep you apprised of the status &amp; progress and follow through on delivery dates.</li> </ul>
<p><b>Anticipate Your Needs</b></p>	 <ul style="list-style-type: none"> <li>▶ Our team will work together to proactively share best practices and provide innovative ideas that make sense to guide you.</li> <li>▶ Our 1,000+ associates have a wide range of expertise to meet your specific needs and address new challenges or opportunities that may arise.</li> </ul>
<p><b>Consider Your Interests</b></p>	 <ul style="list-style-type: none"> <li>▶ We commit to learn and fully understand your situation and business in order to best serve your needs.</li> <li>▶ We will look for ways we can add value to you, as we keep current on personal, business and industry issues that may impact you.</li> </ul>
<p><b>Work as a Team</b></p>	 <ul style="list-style-type: none"> <li>▶ We focus on collaboration and communication across the service team to ensure our service delivery is seamless, communication is clear and knowledge is shared.</li> <li>▶ We use Client Service Plans (CSPs) to share information and ensure everyone involved has the most current information and that we work together.</li> </ul>

*Let us be your guide forward*



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“Our ultimate goal is to build and nurture a loyal and satisfied client base. To deepen our commitment to your loyalty and your satisfaction, we have adopted the Net Promoter System (“NPS”). When you provide input, we will listen and respond. When requested, please take a few minutes to let us know how we are doing and how we can improve.

Your feedback will be used to further enhance your client experience and improve our client service processes so that we deserve your recommendation. Thank you for the confidence you have placed in us.”