

Vision | Mission | Values

Our Vision

We believe that when high-impact entrepreneurs have more time and money, they fuel innovation, create jobs, and propel society forward.

Our Mission

We unlock resources and foster connections to Make Rich Real® for high-impact entrepreneurs and the lives they touch.

Our Values

We are *transparent*

We communicate hard truths to achieve better results.

We are *collaborative*

We integrate our efforts to achieve shared goals.

We are *curious*

We embrace continuous learning, always striving to grow.

We are *visionary*

We challenge the status quo through teamwork and bold ideas.

We hustle *to GSD*

We prioritize results, knowing others depend on our actions.

DEW WEALTH MANAGEMENT

Core Values

We are *transparent*

We exhibit radical honesty with both our clients and each other.

We **do not bend the truth** or hide a failing – to either our clients or each other.

We communicate “hard truths,” even when they are uncomfortable, with the intent of helping our colleagues and clients **rise to a higher level** of performance and results.

We are *collaborative*

We coordinate our efforts toward a common goal in the spirit of mutual respect, accountability, shared resources, support, and humility.

We are “integrators” at heart, **always looking for ways to integrate** the efforts of multiple stakeholders – both internally and when working with the various components of our clients’ Virtual Family Offices.

We define our individual success, in large part, by **how we help our colleagues** grow and succeed.

We are *curious*

We believe curiosity leads to excellence and work to cultivate an unceasing thirst for knowledge both internally and for our clients.

We believe **knowledge is the ultimate competitive advantage**, and thus are always growing our knowledgebase, skillset, and the tools in our toolbox... never satisfying for a plateauing learning curve.

When things don’t go smoothly, or people act in a way we don’t expect, **we assume the innocent intent** of others and commit to listening openly and generously, seeking to understand others’ viewpoints.

Core Values

We are *visionary*

We are creative innovators who are disrupting the wealth management industry by applying innovative solutions to the needs of both our clients and our colleagues alike.

We *look for opportunities* to add innovative tools and training to our systems and library of institutional knowledge, because disrupting the wealth management industry is a team sport.

We *challenge the status quo*; we challenge other people's perceived limitations; and we do not settle for "the way things have always been done."

We hustle *to GSD*

We are a team of highly entrepreneurial problem solvers who hustle to grow both our business and our clients' businesses alike.

We *focus on results* and recognize others depend on each of our actions. Therefore, we will strive never to let them down. We do not give up!

We *take initiative* and do what needs to get done to get results, without complaint, excuses, or efforts to shift responsibility.