

FitzGerald & FitzGerald P.C  
 Examples of Company Core Values

	Implications for Clients	Implications for Team	Implications for Strategy
Truth	Will know where they stand, Have to tell F&F about issues	Must accept responsibility for errors, Must tell about problems, Must accept feedback in an open manner	Only take clients who will allow for accurate financial statements, Get rid of clients who push the envelope
Service	Should receive high levels of service, When combined with Truth, we tell clients about the services they need not just what they want	Must be service oriented, Must serve team members as well as clients	Can only take so many clients, Only do extensions when necessary for client not for F&F
Proactivity	We will strive to keep clients informed about new ideas, tax laws, etc, Clients should have few surprises	We must be outward focused and thinking ahead about what clients need, We should always be looking to improve services and systems	Will only take clients that use the planning services, Get rid of clients who won't fix systems
Education	Clients should be learning new things each year, our focus is not on just reducing taxes but on helping clients think about long term planning.	We must be continuously trying to improve ourselves with books, seminars, etc	We have to have time to learn new things, We must be providing outlets for helping our clients such as seminars and weekly ideas
Balance	We try to model balance for our clients and help them achieve the proper level for them,	We have to define what balance is and work hard to maintain it, we will sometimes be working more than 40 hours but it has to be offset by times with family and friends	We need to be intentional about our workload and our playtime, We need to be careful about the types of clients we take on.