



Helping you live your one life the best way you can

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Client Communication Policy

We believe that communication should be consistent, clear and effective. As a client of ours, you have unlimited access to our team. Most clients find the following guide helpful in understanding when best to call by phone and when to email.

911 Priority – call our office

- You need an answer within 24 hours, or same day.
- The matter IS time sensitive.
- The matter involves a traumatic event.

Medium Priority – Call or e-Mail.

- You need to visit with someone with the next 72 hours, but it is not immediate.
- The matter is not time sensitive.
- The matter cannot wait until a monthly or semi-annual appointment.

Low Priority – E-mail Generally

- You want our office to be aware of something, but no immediate action is needed.
- There are no deadlines with this matter.
- The matter can wait until a monthly or semi-annual appointment.

e-Mail is not instant communication. We know how reliant as a society we have become on email and oftentimes, treat it as instant communication. We want to stress that if you have a 911 priority item, please call, so that we can give the matter the immediate attention it deserves.

What should I ask or tell you about when it comes to my finances? We want to be your 411 and 911 when it comes to your personal finances.

We hope that by outlining our firm's communication policy you will find that it is consistent, clear and an effective method of maintaining a strong and healthy relationship.