

# Client Commitment

Our aim is to provide exceptional service to all our clients, and be **EPIC Together**

## **E**xcellence

**We pride ourselves on delivering a high quality service**

We aim to ensure colleagues are suitably experienced, qualified and strive to deliver excellent client service

We will respond to calls and emails within one working day and technical queries within seven working days, unless otherwise agreed

We invest time to understand our clients' business so that we can offer a bespoke service. We require clients to be open about changes to their business

We endeavour to help clients meet their deadlines. Clients commit to provide information within required timescales to enable us to do this

## **P**rogressive

**As an ambitious and innovative partnership, we adopt a progressive and inclusive approach**

We will endeavour to use the best technology available to us

We invest in our colleagues' development so they can adapt to our clients changing requirements

We will offer innovative ideas and suggestions regarding all financial issues facing our clients

We offer an integrated approach across our different service lines so that we can meet the evolving needs of our clients

We welcome feedback from our clients as we continuously seek to improve

## **I**ntegrity

**We act with integrity, honesty and respect**

We trust our clients to do the right thing and they can expect the same in return

We will respect our clients and request the same from them

We expect a fairness in all client interactions to our mutual benefit

Our dealings with clients remain confidential

We will be fair and transparent with our fees and keep clients regularly updated with any changes. Clients will pay us in accordance with agreed terms

## **C**onnected

**Our commercial strength supports the prosperity of our region and its people**

As independent business leaders, we can introduce clients to like-minded professionals

We aim to use clients for services that we requires as a business

We build longstanding relationships with our clients as trusted business advisers

We are committed to improving our corporate social responsibility and encourage colleague involvement

## **T**ogether

**Working together as one team we listen, communicate and support**

We aim to ensure that the same senior contact remains with the client for the duration of our working relationship

We will work together to help clients achieve their goals

We will communicate regularly and in plain English

We understand the challenges business owners face and will use our expertise to provide support

Our service is led by our **Values**.

We put them at the heart of everything we do. They direct our decisions, our actions and how we work together with each other, our clients and our communities. Through our **Values**, we make these commitments to our clients. In return we ask our clients to commit to our requirements.