

## A. Mission

Our mission is to assist people in developing and implementing strategies to protect and transfer their wealth for the benefit of their family and community.

## B. Core Values

**ALWAYS DO THE RIGHT THING.** The right thing for the client is the right thing for CMDB.

**RELATIONSHIPS** are the key to success. Build, nurture and appreciate them.

**EXCELLENCE** is our standard of performance. The pursuit of excellence is a journey never completed.

**PROVIDE VALUE** with quality service.

**TEAMWORK** is critical. We make it together, or not at all.

**FAMILY.** Work hard. Play hard. Make time for both.

**GROW.** We grow as a firm when we grow as individuals.

**BE AUTHENTIC.** All people deserve to be treated with fairness and dignity.

**HAVE FUN.** A fun place to work results in a happy team, clients, and families.

**FINANCIAL STRENGTH** provides opportunities for growth and expanded services.

**GIVE.** In giving we receive.

## C. PHILOSOPHIES

Approaching our work with these philosophies will help us maintain our core values:

1. We provide **effective** results with **efficiency**.
2. **Simplicity** is the ultimate sophistication.
3. We are honest, sincere and reasonable. Our **integrity** sets us apart.
4. Our **service** is personal, professional and consistent.
5. Our **team** is our most important resource. We support, respect, communicate with and learn from one another. We celebrate our successes and failures together.
6. We strive for **balance** our professional and personal goals.
7. **Self-improvement** leads to excellence.
8. We are committed to our **local community** through volunteer work and financial support.

CMDB will stand head and shoulders above the competition by keeping with these philosophies each day.