

Mutual Service & Communication Standards

At Next Play Wealth, we view our work as a partnership. The strongest financial outcomes are built on clarity, communication, and mutual accountability. This document outlines the standards that guide our relationship.

Our Commitment to You:

- We will always act in your best interest.
- We will communicate clearly and in plain English.
- We will provide proactive, structured guidance.
- We will prepare thoroughly for every meeting by respecting your schedule and communicating agendas
- We will coordinate strategy intentionally, not reactively.

You will have access to our team, and we encourage questions whenever they arise.

Communication & Accessibility

Primary Communication Channels:

- Phone and email for direct communication.
- Secure portal for sensitive document exchange.

Response Expectations

We aim to respond within 1–2 business days. Some inquiries require research or analysis and may take longer. When that is the case, we will communicate expectations clearly.

Advisor Direct Access

Clients have access to their advisor's cell phone for urgent matters. We ask that this channel be reserved for time-sensitive situations requiring immediate attention.

Meeting Preparation

If an urgent or additional meeting is requested, we ask that you provide the topic in advance so we may prepare thoroughly and use our time efficiently.

Our Role

We provide:

- Education.
- Coordinated financial planning.
- Ongoing portfolio oversight.
- Proactive tax strategy.
- Clear action steps.
- Collaboration with your other advisors when appropriate.

Our responsibility is to guide and structure strategy. Major life changes, financial shifts, or emerging concerns should be communicated so adjustments can be made thoughtfully.

Your Role

To ensure we can serve you effectively, we ask that you:

- Provide accurate and complete information.
- Submit requested documents in a timely manner.
- Inform us of significant life or financial changes.
- Review materials and ask questions when unclear.
- Maintain open and honest communication.

If there is ever something we can improve, we ask that you tell us. We are committed to continuously improving in service of you, our client.