Farmington, UT · Houston, TX
801.513.2545 · 281.990.8228
info@promontoryfp.com · promontoryfp.com

OUR CLIENT SERVICE COMMITMENT

What you can expect from us: how to reach us, how quickly we respond, and the standards we hold ourselves to in every client relationship.

FOUR WAYS TO REACH US

CALL	TEXT	EMAIL	SCHEDULE
Utah 801.513.2545 Texas 281.990.8228	385.503.8625	info@promontoryfp.com	calendly.com/promontoryfp

We aim to respond within one business day. Urgent? Call the office and ask for the person you work with.

Email is not a secure channel. Please ask us for a secure link before sending account numbers, Social Security numbers, or statements.

WHAT YOU CAN EXPECT

RESPONSIVENESS
We answer calls, texts, and emails promptly and keep you informed when markets move or the economy makes headlines — in straightforward language, not jargon. Our email newsletter keeps you current between conversations.

PROACTIVE, GOAL-BASED PLANNING
We revisit your goals, assumptions, and strategy as life changes — a new job, a new family circumstance, a shift in priorities — and adjust the plan with a long-term perspective.

PERSONALIZED ADVICE
Advice is built around your objectives, values, and circumstances. We take the time to understand what matters most to you, and we adjust our recommendations as that changes.

EDUCATION & TRANSPARENCY
We explain the reasoning behind every recommendation, including the risks and the trade-offs. Fees and costs are disclosed in writing before you engage us and are always open for discussion.

FIDUCIARY COMMITMENT
As your investment adviser, we are held to a fiduciary standard and act in your best interest. Where a member of our team also acts as a registered representative or insurance agent, we tell you in advance and disclose the compensation involved.

INVESTMENT STEWARDSHIP
We follow a disciplined process built on diversification, risk management, and long-term objectives. Your accounts are monitored monthly and rebalanced as needed.

TAX & PROFESSIONAL COORDINATION
We consider tax implications as part of the planning process and coordinate with your CPA and attorney. Tax preparation and legal services are engaged separately.

OPERATIONAL EXCELLENCE
Paperwork, transfers, and account changes are handled accurately and followed through to completion, so the administrative side of your financial life stays simple.

LONG-TERM PARTNERSHIP
We build relationships meant to last, and we measure success by your progress toward the goals we set together — retirement and everything alongside it.

YOUR SERVICE RHYTHM

Accounts monitored monthly · Custodian statements quarterly · A review meeting at least once a year

240 N East Promontory, Suite 200, Farmington, UT 84025 · 15150 Middlebrook Dr., Houston, TX 77058