

# ELITE CONSULTING PARTNERS

CORE VALUES

&

The Elite ***NEXT-LEVEL*** Process

# **ELITE CONSULTING PARTNERS**

## **CORE VALUES**

**Elite Consulting Partners** is a financial service recruiting, business consulting, and M&A firm comprised of a team of industry leading consultants dedicated to core values which emphasize personal and professional growth and resulting in maximum performance at every level, for both their clients and themselves.

## **COMMITMENT TO CLIENT**

**A CLIENT-FOCUSED MENTALITY, ACTIVELY LISTENING,  
AND STRIVING TO ACHIEVE OUR CLIENT'S GOALS AND  
EXCEED THEIR EXPECTATIONS.**

Dedication to clients goes beyond successful completion of work tasks. It means being of service, actively listening, and striving to achieve your client's goals and exceed their expectations. At Elite Consulting Partners, our client is the priority and our entire team takes pride in providing an unparalleled level of services that enable our clients to achieve their desired goals.

# **COMMITMENT TO SUCCESS**

**BE PASSIONATE AND DISCIPLINED WITH LASER FOCUS TO THE COMMITMENT OF EXCELLENCE IN ORDER TO ACHIEVE A MAXIMUM LEVEL OF SUCCESS.**

Approaching all aspects of your life with passion, discipline, and laser-focused is key to becoming a successful professional and individual. By completing tasks at the highest level of excellence, Elite Consulting Partners team members commit themselves daily to the strategic thinking and practices which allow them to over-achieve personally and professionally.

# ***COMMITMENT TO INTEGRITY AND PROFESSIONALISM***

**PUTTING INTEGRITY AT THE FOREFRONT WHILE  
REMAINING DEDICATED AND DEPENDABLE  
IN ORDER TO FACILITATE RELATIONSHIPS  
BUILT ON TRUST.**

In all aspects of life, the cornerstone of excellence will always be integrity. By being trustworthy and dependable you garner the capital upon which long-term relationships and success are built. At Elite Consulting Partners, our team provides our clients with the highest level of service based on trust, uncompromising professionalism, and excellence.

# **COMMITMENT TO LEARNING**

**CONTINUALLY PURSUING GROWTH AND KNOWLEDGE  
THROUGH DAILY RITUALS OF  
PERSONAL AND PROFESSIONAL DEVELOPMENT.**

Constantly growing, evolving, and gaining new knowledge is a life-long pursuit and a trait consistent among great leaders, professionals, and individuals. At Elite Consulting Partners we are constantly on the pursuit of knowledge, and commit themselves to daily rituals of learning from all personal and professional development resources.

## **COMMITMENT TO TEAM**

**USE OUR COLLECTIVE SKILLS AND KNOWLEDGE TO  
ACHIEVE GREATER SUCCESS FOR OUR CLIENTS AND  
EVERY MEMBER OF OUR TEAM.**

No one walks the path of life alone, be it in their personal or professional pursuits and endeavors. At Elite Consulting Partners we are a team first and foremost, using our collective skills and knowledge to achieve greater results for our clients and team members.

## **COMMITMENT TO FAITH**

**MAINTAIN A POSITIVE MINDSET, PATIENCE, AND PURPOSE IN EVERYTHING WE DO TO ACHIEVE OUR PERSONAL AND PROFESSIONAL GOALS.**

In today's society, faith does not necessarily refer to a religion but is a mindset and commitment to positivity. At Elite Consulting Partners, it is through the virtues of patience, positivity and process that we are able to foster open communication with our clients and team which leads to optimal achievement of their personal and professional goals.



# **COMMITMENT TO FIRM-FAMILY CONNECTION**

**FOCUSING ON THE CONNECTION BETWEEN OUR  
PERSONAL AND PROFESSIONAL LIVES  
TO GUIDE AND MENTOR EACH OTHER TO  
GREATER LEVELS OF ACHIEVEMENT.**

There is a parallel between who you are at work and who you are at home. By focusing on those synergies, you achieve a greater level of personal and professional performance. Elite Consulting Partners focuses on the whole of each team member's personality and uses our collective professional and emotional intelligence to guide and mentor each other to greater levels of achievement.

# THE ELITE *NEXT-LEVEL* PROCESS

WE HAVE REFINED A 5-STEP PROCESS TO HELP ADVISORS PUT ALL THE PIECES TOGETHER TO MAKE THEIR MOVE TO A NEW FIRM AS SUCCESSFUL AS POSSIBLE. OUR PROCESS WILL EVOLVE THROUGHOUT OUR RELATIONSHIP AS WE WORK TOWARDS FINDING THE RIGHT FIT FOR OUR CLIENT, THEIR CLIENTS, AND THEIR BUSINESS.

We call it THE ELITE *NEXT-LEVEL* PROCESS where we;

**E** - Evaluate Our Client's Business for Understanding

**L** – Learn About Needs and Objectives

**I** – Investigate All Available Options

**T** – Talk with Firms to Match Clients Needs and Objectives Versus Firm Deliverables

**E** – Examine and Negotiate All Financial Offerings to Match Needs and Objectives

After we go through the Elite *NEXT-LEVEL* Process we help you select the best firm to matches our client's needs, objectives, and financial requirements to ensure an optimal fit for their clients, their business, and their families.