

# Experience Principles

Experience Principles are the foundation for how we treat our customers and reflect how our customers want to feel when they interact with our brand. Apply these principles to help our customers experience our Brand in a way that feels right, for them.



## Personal

Each of our customers is a unique individual, so here's an easy way to make it personal: greet each customer by name and learn their preferences. Find ways to tailor their experience to what is important to them.



## Helpful

Our customers look to us for help, and we strive to improve their individual situation. One way you can be helpful is to provide assistance based on your customer's needs and goals.



## Caring

Our customers are valued members of our community and we want to help them achieve their financial goals. To show you care, be sincere and let them know you're there for them.



## Reliable

Our customers trust that we are managing their money and assets responsibly, with their best interests always in mind. Being reliable means consistently following through and always doing what we say we'll do.



## Secure

Our customers rely on us to keep their financial information and data safe and secure. One important way to safeguard our customers' security is to follow corporate policies.