

Email to Clients

Subject: Office Hours & Team Self-Care

Date: March 25, 2020

Dear Client,

This email is for informational purposes. No response is required on your part.

First and foremost, I want to thank all of you who have reached out and asked how our team is doing during this tumultuous time. It seems like we are hearing from you daily asking about our well-being at the frontlines of this financial situation. It warms our hearts.

Overall, we are doing well and as you can imagine we are keeping ourselves quite busy.

Currently we are meeting as partners, an investment committee and as a team daily. To be clear, this is not out of panic. This is to make sure we are communicating often and keeping on top of both our client portfolios in this ever-changing environment and our client service standards.

From a team self-care standpoint, we have adopted the following changes in habits.

1. Going for walks in pairs. Any team member can ask another to step outside for a walk and a chat.
2. Sharing tools and resources to maintain positivity, such as the online Yale class called "The Science of Well-Being" and associated podcast. We will be sharing more on this in the coming weeks.
3. Taking time to pause and have some fun, like treating the team to lunch on a regular basis (while also supporting our local eateries).
4. Practicing the CDC's recommended health precautions both in the office and away. As you likely know, we are considered an essential service. We are representing you in the market, while not taking any unnecessary risks to our health.

Please Note: In this vein of self-care, we are closing our office early at 1:00pm on Friday, March 27th to give our staff some much-needed decompression time. You can also expect to receive Greg's note on optimism and opportunities in the market on Friday.

As always, please reach out when you need us. We will continue to be here for you as a source of guidance and positivity throughout this volatile time.

Change is the only constant,

--

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