



CORE VALUES

PURPOSE:

Regency Wealth Management is a creative and disciplined enterprise that seeks to produce an environment where clients and employees can flourish both economically and philanthropically in a God honoring way.

PRINCIPLES:

The Regency team is comprised of experts serving others excellently with integrity and transparency in a collaborative manner. As we assist clients in achieving and maintaining financial security, we seek to inspire them to live generously so that they can bless others.

OUR VALUES:

- Empathy
- Fiduciary
- Generosity
- Honesty
- Inspiration
- Integrity
- Joy
- Transparency

OUR GOALS:

TO BUILD HEALTHY AND RESPECTFUL RELATIONSHIPS

TO BE LEADERS IN OUR COMMUNITIES

TO ASSIST CLIENTS IN MEETING THEIR FINANCIAL OBJECTIVES

TO PROVIDE MEANINGFUL CAREERS TO OUR EMPLOYEES

TO GROW PROFITABLY WITHOUT COMPROMISING SERVICE QUALITY