

Fiat Wealth Management: Communication Guidelines and 2024 Calendar



To Our Valued Client,

We hope you enjoyed the holiday season! We believe that communication should be consistent, clear, and effective. Most clients find the following guide helpful in understanding when best to call by phone and when to email our office.

Immediate Priority	Medium Priority	Low Priority
Call the Office: 952-426-9116 Option 1 for Client Service	Call/Email - Email Preferred	Email Preferred
Your request is time sensitive and you need to speak with someone within the next 1-2 business days.	You need to speak with someone within the next week or so. The matter cannot wait until your next appointment.	You want our office to be aware of something, but it is not urgent.
Examples: An urgent need for a distribution (please note that we may have to place trades before we can send cash out), fraud/compromised information, etc.	Examples: Setting up contributions or distributions, questions about Schwab Alliance or Orion, etc.	Examples: An address change, desire to change document delivery preference, topic/question to discuss during your next visit, etc.

We want to stress that if you have an immediate priority request, please call our office so that we can give the matter the immediate attention it deserves. You may leave a detailed voicemail message with any pertinent information.

Distribution Requests: We would like to remind you that because Fiat Wealth Management is the third-party between you and Charles Schwab, if cash is not readily available, we will need to place trades to raise cash before sending out a distribution. Trades often take 2-3 business days to settle, when submitted prior to the day's market close (3pm CT).

We hope that by outlining our firm's communication policy, you will find that it is consistent, clear and an effective method of maintaining a strong and healthy relationship.

Below is an outlined calendar of some of the items you can expect this year:

Office Closures:

- January 15: Martin Luther King Jr.
- February 19: President's Day
- March 29: Good Friday
- May 27: Memorial Day
- June 19: Juneteenth
- July 4 – 5: Independence Day
- September 2: Labor Day
- November 28 – 29: Thanksgiving and Black Friday
- December 24: Christmas Eve
- December 25: Christmas
- January 1: New Year's Day

Events and Education:

- Wine and Wisdom (Monthly)
- Podcast Episode Release (Bi-Weekly, Wednesday)
- Blog Article (Weekly)
- Rooftop Happy Hours (May-September)
- Market Commentary (Monthly)
- Email Communication (Weekly, Monday and Thursday)
- Inner Circle Workshop Webinars (Monthly)

**NOTE: [Please click here to subscribe to the official Fiat Google Calendar](#) and stay updated on all the events and education happening at Fiat in 2024.*

If you have any additional questions, please do not hesitate to contact your advisor. We are here to help.

**Thank you,
Fiat Wealth Management**

