



The Insigneo Way

insigneo

Methodology Framework

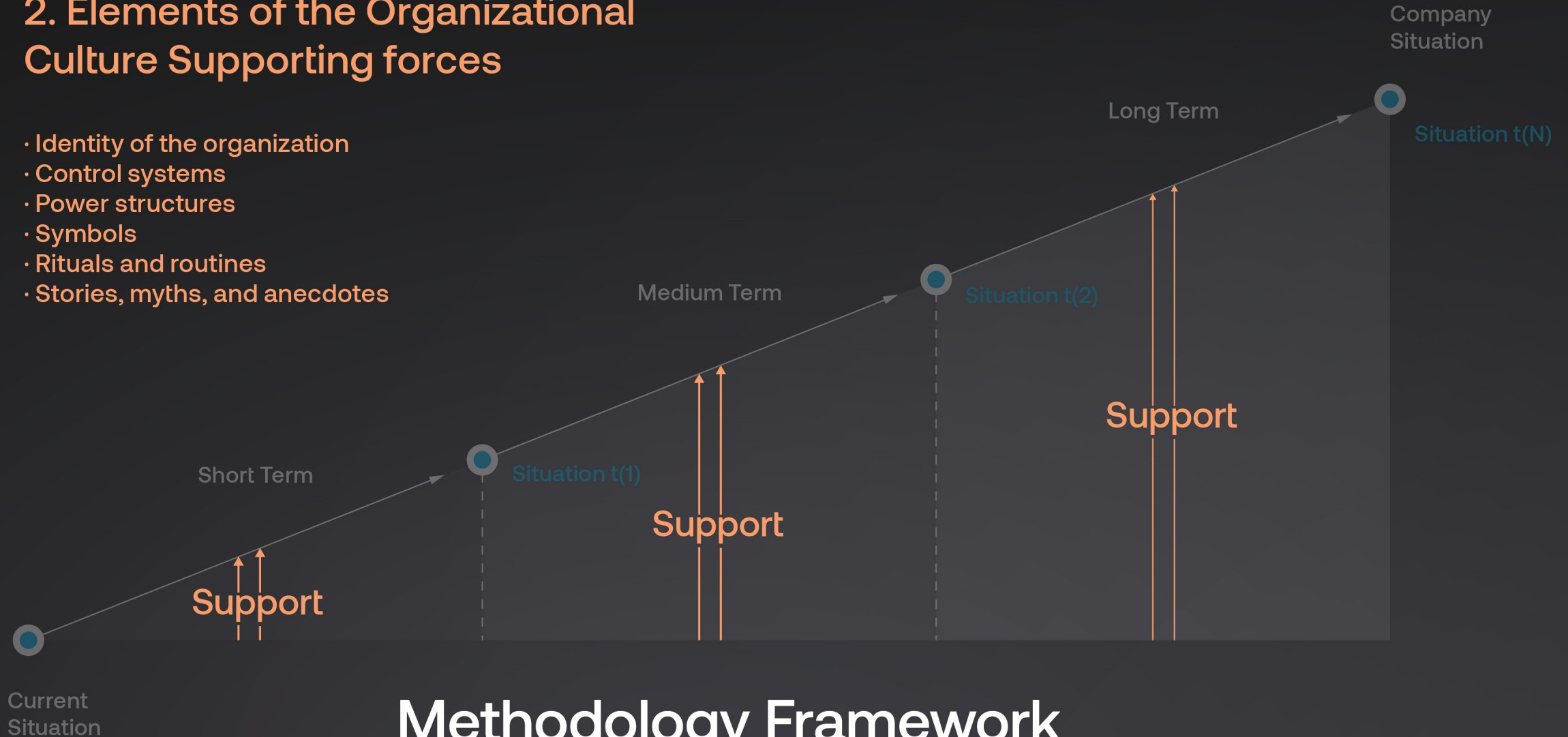
1. Organizational Objectives Direction and trajectory



Methodology Framework

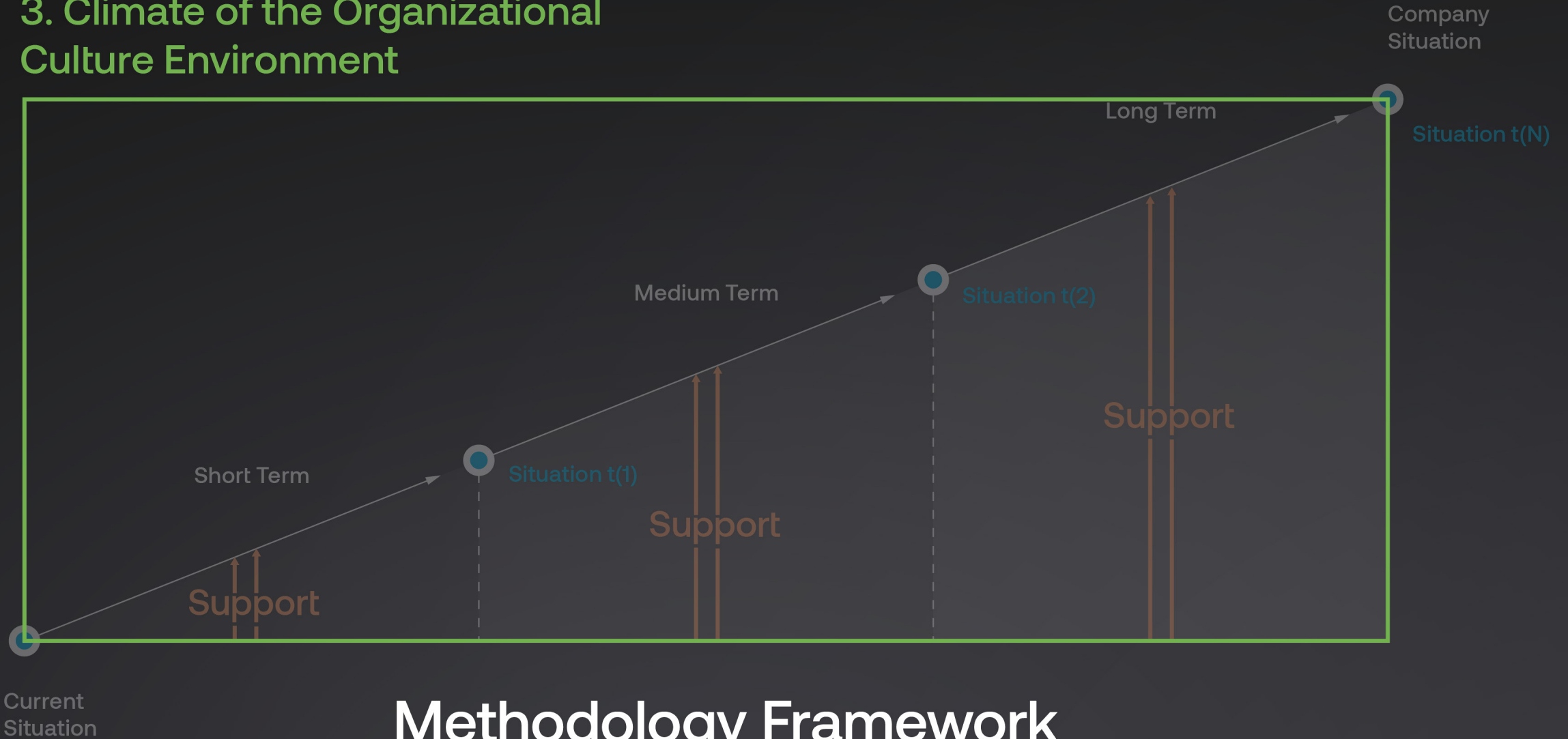
2. Elements of the Organizational Culture Supporting forces

- Identity of the organization
- Control systems
- Power structures
- Symbols
- Rituals and routines
- Stories, myths, and anecdotes



Methodology Framework

3. Climate of the Organizational Culture Environment



Methodology Framework

Our Culture



Our Culture

MISSION

Insigneo provides innovative financial solutions to independent investment professionals and their global clients. We strive to create a better, simpler and friendlier experience and to positively impact our employees, partners and communities.



VISION

Be the first tech-enabled US wealth management platform designed to service the needs of non-US investors.

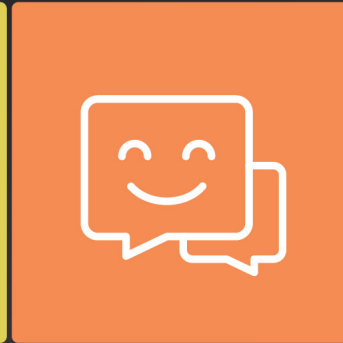
What defines us?

How do we work?

Always do
my best
(Excellence &
Commitment)

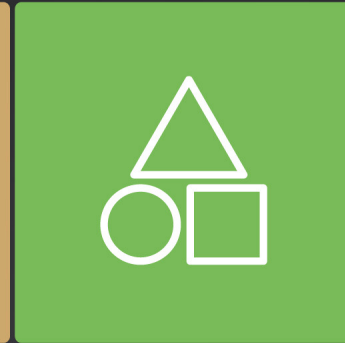
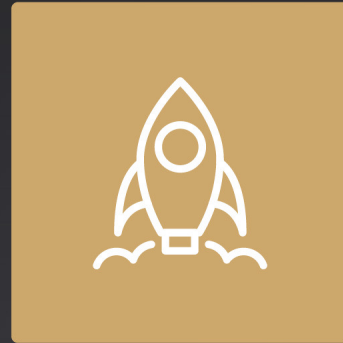


Always do
what's right
(Integrity &
Transparency)



Always create
a positive
environment
(Harmony
& Inclusion)

Aim higher



Keep it simple

Think ahead



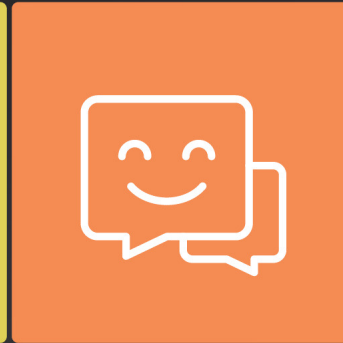
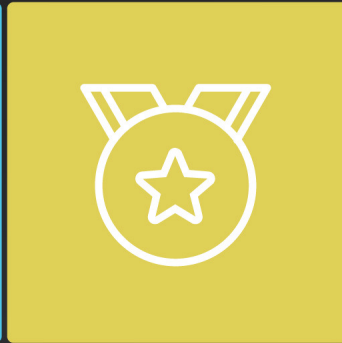
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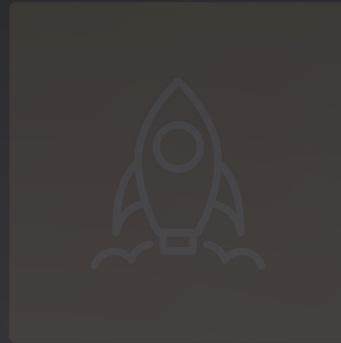


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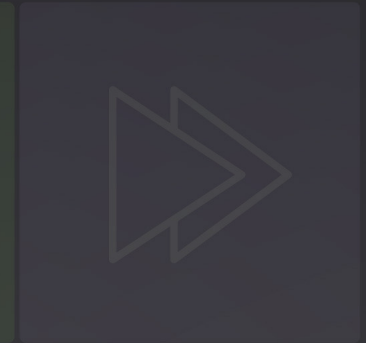
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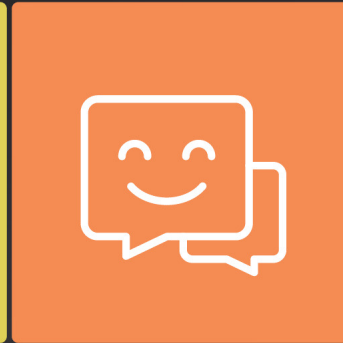


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Keywords

Ethics
Honesty
Responsibility

Passion
Discipline
Proactivity

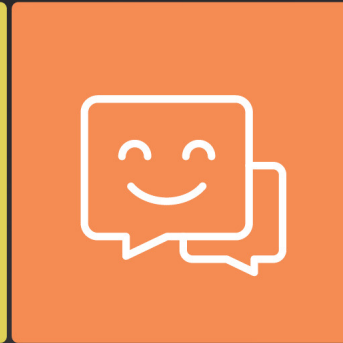
Respect
Courtesy
Happiness

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Our Behaviors

I take pride in acting correctly
I know my capabilities and accept help
I take responsibility for my actions

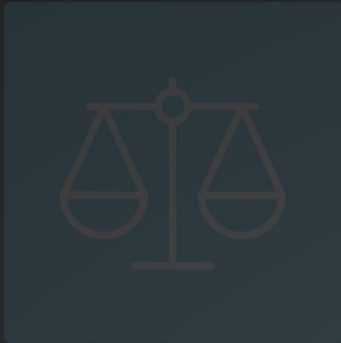
I encourage new ideas
I accept challenges and keep my word
I always support my coworkers

I treat everyone with dignity
I am available to connect with others
I am interested in the common good

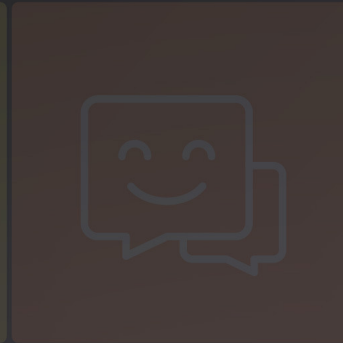
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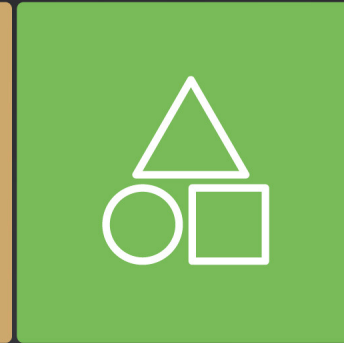
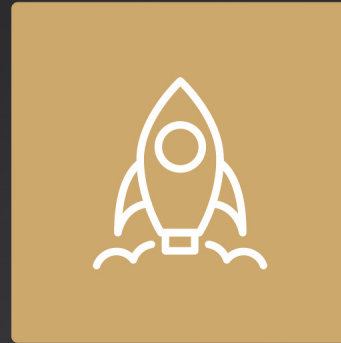


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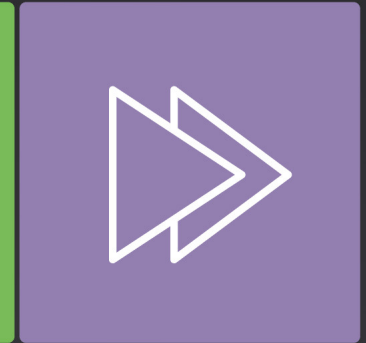
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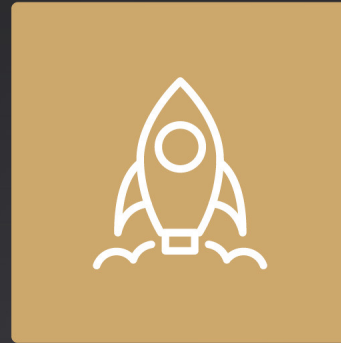
Control standards
Sustained Profitability
Partner growth

Service Standards
Solution-driven

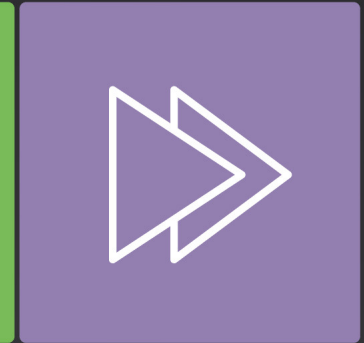
Innovation
Brand and Technology
Value-added Solutions

How do we work?

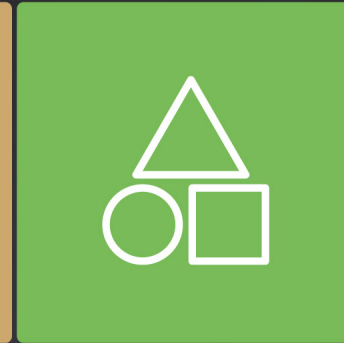
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This is Insigneo