LIVE

HOW WE SHOW UP EVERY DAY

STATERA

STATERA WEALTH

LIVE

A message from the founders...

At Statera, we believe that how we show up matters just as much as what we do.

We are entrusted with helping people navigate some of the most important financial decisions of their lives. That responsibility is not something we take lightly. It requires clarity, discipline, and a commitment to doing things the right way—every time.

At the same time, while we take our work seriously, we don’t take ourselves too seriously.

We believe in building a team that works hard, improves constantly, and holds a high standard—while also being the kind of people others genuinely enjoy working with.

A team that communicates clearly, supports one another, and takes pride in doing meaningful work together.

LIVE STATERA is how we operate.

It’s how we make decisions, how we handle challenges, and how we hold ourselves accountable. It’s not something we turn on and off—it’s the standard we come back to every single day.

We won’t be perfect. But we will be intentional.

And every day, we recommit to the same idea:

We Live Statera.

— Tony Christensen & David Harris

LEAD

Lead with ownership

OWNERSHIP IS THE FOUNDATION OF EVERYTHING WE DO.

At Statera, we don’t wait, deflect, or pass responsibility—we step in and take charge. Whether it’s a small task or a major issue, we treat outcomes as our responsibility and move things forward with urgency and clarity.

What this means:

We take full responsibility for results. Problems don’t get passed—they get solved.

What is expected:

- Follow through on commitments
- Communicate early when something is off
- Take responsibility for mistakes
- Complete tasks fully

What awesome looks like:

- Solving problems before they escalate
- Taking initiative without being asked
- Owning client outcomes end-to-end
- Creating clarity in moments of uncertainty

“ACCOUNTABILITY BREEDS RESPONS-ABILITY.”

-Stephen Covey

IMPROVE

Improve daily

GROWTH IS NOT SOMETHING WE TALK ABOUT - IT'S SOMETHING WE LIVE.

We believe that small, consistent improvements compound over time into meaningful progress. We stay curious, coachable, and committed to becoming better—personally and professionally.

What this means:

We embrace challenges and it helps us grow to become the best versions of ourselves.

What is expected:

- Be open to feedback
- Learn from mistakes
- Actively pursue growth
- Stay engaged in development

What awesome looks like:

- Applying feedback quickly
- Seeking out learning opportunities
- Turning challenges into growth
- Continuously raising personal standards

"IT'S NOT ABOUT THE GOAL. IT'S ABOUT GROWING TO BECOME THE PERSON THAT CAN ACCOMPLISH THAT GOAL"

-Tony Robbins

VALUE

Value the Team

GREAT TEAMS DON'T HAPPEN BY ACCIDENT.

Great teams are built through trust, communication, and a willingness to put the team ahead of the individual. At Statera, we support each other, communicate clearly, and step in when it matters most.

What this means:

We win together—or not at all.

What is expected:

- Communicate clearly and promptly
- Be honest about workload and capacity
- Treat everyone with respect

What awesome looks like:

- Proactively helping others succeed
- Giving honest, constructive feedback
- Creating clarity and alignment
- Putting team success above personal preference

"NOBODY WINS ALONE."

-John C. Maxwells

EXECUTE

Execute with integrity

INTEGRITY IS NOT SITUATIONAL. IT'S FOUNDATIONAL.

We do the right thing not because it's easy, but because it's right. Our clients and teammates trust us to act with honesty, transparency, and consistency in every situation.

What this means:

We do the right thing. Every time.

What is expected:

- Be honest and transparent
- Own and fix mistakes
- Make principled decisions
- Follow through on commitments

What awesome looks like:

- Speaking up when something isn't right
- Making difficult but correct decisions
- Building trust through consistency
- Holding yourself to a higher standard

"INTEGRITY IS DOING THE RIGHT THING, EVEN WHEN NO ONE IS WATCHING."

-John C. Maxwells

Deliver an EXCEPTIONAL client experience

OUR CLIENTS ARE THE REASON WE EXIST.

Every interaction is an opportunity to build trust, simplify complexity, and deliver clarity. We go beyond expectations—not for recognition, but because that's the standard we hold ourselves to.



What this means:

Every interaction matters.

What is expected:

- Be prepared and intentional
- Communication clearly and proactively
- Follow through on every promise
- Treat every client with care

"PEOPLE WILL FORGET WHAT YOU SAID, BUT THEY WILL NEVER FORGET HOW YOU MADE THEM FEEL."

-Maya Angelou

What awesome looks like:

- Anticipating client needs
- Making complex things simple
- Creating memorable, meaningful interactions
- Strengthening trust with every touchpoint

STATERA WEALTH

STATERA
WEALTH MANAGEMENT

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Financial Planning and Advisory Services offered through Statera Wealth Management, a federally registered investment advisor with the Securities and Exchange Commission.