

Client Bill of Rights

As your advisor, presenter or coach I am committed to the following:

1. Be a great listener. I will first seek to understand.
2. Provide considerate and respectful professional services.
3. Only work on your behalf if I have the skills, knowledge and experience necessary to provide excellent results.
4. To “tell it like it is” and be open and honest with you in all transactions.
5. To act on your behalf in the most dignified manner possible and conform to all legal and ethical professional guidelines.
6. To communicate and return all calls, emails, etc. within 24 hours.
7. To fairly bill you only for actual time, fees, and costs incurred and to provide detailed billing statements.
8. Preserve your confidences, honor your privacy, and only disclose the facts of your business, or other matters, to persons on a ‘need-to-know’ basis.
9. Remain current on any laws and management trends related to your matter.
10. Properly maintain all financial books and records related to your matter and account, including financial accounts, billing statements, cost ledgers, trust accounts, etc.
11. Maintain and store your physical or digital records in a place which is secure from theft and unnecessary access, and which is protected against the possibilities of fire or water damage.
12. To promptly release client files upon request.

If ever a question or concern please let me know. Thank you.
Don Phin, Esq | don@donphin.com | (619) 852-4580



HRSherpas