

TOUCHPOINT FINANCIAL

Your wealth. Your values. Your way.

NEW EMPLOYEE ORIENTATION

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Introductions

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History of TouchPoint

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Mission | Vision | Values

4

Your First Day

5

Choosing Your Benefits



WELCOME TO OUR TEAM

JAMES BRIGGINS, CEO

SHARE WITH YOUR GROUP

Your
Name

```
graph LR; A[Your Name] --> B[Your Role]; B --> C[Fun Fact];
```

Your
Role

Fun
Fact

HISTORY OF TOUCHPOINT

*** Insert Video Here ***

OUR MISSION



To help people
achieve financial
security through
investments that
match their values.



OUR VISION

At TouchPoint, we provide financial services that enable people to achieve their financial goals in a way that aligns with their values.

Our teams seek to touch people's lives by figuring out the point where their goals, their values, and their finances meet.

We hire a diverse team because we serve a diverse population.

Diversity



Generosity

OUR VALUES

Compassion

Sustainability

Financial
Clarity

INDIVIDUAL REFLECTION

How do the values of our company apply to my role?

In what tangible ways can I support the mission of TouchPoint?

Rewrite the TouchPoint mission statement to go with your specific role, so it becomes your mission statement.

GROUP REFLECTION

Without looking, see if, together, your group can recall the five values of Touchpoint.

Share your individual reflections regarding how the values apply to your roles.

Share your individual mission statements.

BREAK TIME!

07:16