



Communication

Email

- We check our email at least once per work day and aim to respond within 1-2 business days.
- If you have not heard from us within two business days, please assume we did not receive your message.
- If we are out of the office for more than 24 hours during the work week, we will have an auto reply directing you how to get in touch with our team.
- If we email you and do not hear a response within a week, we will reach out to you by phone.
- If you have any requests that are not advice specific, please email clientservices@larsonwealthmgt.com. These include address changes, move money requests, online access and account updates. You are welcome to copy your advisor on the email as well, and remember that we can only accept trade instructions and move money requests verbally for your protection.

Phone

- We are available by phone during our business hours (M-F 9am - 4pm) at 540-574-4391. Please use this number to reach anyone on the team and/or leave a voicemail.
- If we call you and do not hear a response within a week, we will follow up via email or phone.

Voicemail

- We aim to check our voicemail as soon as possible after seeing a notification. If your voicemail asks for a response, we will get in touch with you within one business day.
- If we are out of the office for more than 24 hours, we will have a greeting on our voicemail telling you so and directing you how to get in touch with our team.
- Please do not leave trading instructions over voicemail as they cannot be honored. Instead, please tell the reason for your call and we will get back to you as said above.

Text

- You may text our office at 540-574-4391 at any time. Texts to this number can be seen by the entire team and we review our text inbox once every business day.
- For a faster response, we encourage you to call us directly.

Weekends/Holidays

- If you email or call during weekends or on federal holidays, we will respond on the next business day.