

The MGO Way

From our founding, we've wanted MGO to be different from other firms. Different in how we treat our clients, different in how we work with each other, and different in the results we achieve. These differences are best captured in the 26 Fundamentals that are the foundation for our unique culture.

1 Have a “build” mindset.

Innovation, improvement, and success don't come from playing it safe. They come from an intentional willingness to try something new or create something different. Bring your ideas, energy, passion, and purpose to build something and take MGO and its clients to the next level each and every day.

2 Do what's best for the client.

In all situations, do what's best for the client. Put their needs first. Give them not what they simply ask for but what they need. Guide their financial world comprehensively with genuine care.

3 Act with integrity.

Demonstrate an unwavering commitment to doing the right thing in every action you take and in every decision you make, especially when no one is looking. Always tell the truth, no matter the consequences. If you make a mistake, own up to it, apologize, and make it right.

4 Practice blameless problem-solving.

Demonstrate a relentless solution focus, rather than pointing fingers or dwelling on problems. Identify lessons learned and use those lessons to improve ourselves and our processes so we don't make the same mistake twice. Get smarter with every mistake. Learn from every experience.

5 Think team first.

It's not about you, it's about the team. Don't let ego or personal agendas get in the way of doing what's best for the MGO team or the client. Be willing to share people and expertise with others across the firm to deliver the very best solutions for our clients. Avoid unhealthy competition and have each other's backs.

6 Be proactive.

Solve problems before they happen by anticipating future issues, planning for contingencies, and addressing them in advance. Work with appropriate lead times. Be prepared and take initiative. Take control and avoid surprises. Preventing issues is always better than fixing them.

7 Listen generously.

Listening is more than simply “not speaking.” Give others your undivided attention. Be present and engaged. Minimize the distractions and let go of the need to agree or disagree. Suspend your judgment and be curious to know more, rather than jumping to conclusions. Above all, seek first to understand.

8 Straight talk.

Speak honestly in a respectful way that helps to make progress. Say what you mean, and be willing to ask questions, share ideas, or raise issues that may cause conflict when it is necessary for the team's success. Be courageous enough to say what needs to be said. Address issues directly with those who are involved or affected.

9 Show meaningful appreciation.

Recognizing people doing things right is more effective than pointing out when they do things wrong. Regularly extend meaningful acknowledgment and appreciation – in all directions throughout our firm.

10 Focus on personal growth.

Be a lifelong learner. Seek out and take advantage of every opportunity to gain more knowledge, increase your skills, and become a greater professional. Be enthusiastic about sharing what you've learned with others to better the team and better our clients.

11 Be curious.

In the search for the best solutions challenge and question what you don't understand. Don't accept anything at “face value” if it doesn't make sense to you. Be curious, ask thoughtful questions, and listen intently to the answers. Dig deeper to go beyond the expected. Ask the extra question.

12 Be relentless about improvement.

Continuously re-evaluate every aspect of your work to find ways to do it even better. Don't be satisfied with the status quo. Because we have always done it this way is not a reason to not make improvements. Find ways to get things done faster, more efficiently, and deliver a better experience to our colleagues and our clients.

13 Set clear expectations.

Create clarity and avoid misunderstandings by discussing expectations upfront. Set expectations for others and ask when you're not clear on what someone expects of you. End all meetings with clarity about action items, responsibilities, and due dates.

14 Invest in relationships.

Trust is essential to building meaningful relationships. Build trust by getting to know colleagues and clients on a personal level. Show people you care about them as individuals, moving beyond what is required to transact business. Strong relationships enable us to work through difficult issues and challenging times more successfully.

15 Be a fanatic about response time.

Respond to questions and concerns quickly, whether in person, on the phone, or by email. This includes simply acknowledging that you got the question and you're "on it," as well as keeping those involved continuously updated on the status of outstanding issues.

16 Go beyond.

Be willing to do whatever it takes to accomplish the job ... plus a little bit more. Whether it is starting early, staying late, or doing something that's not in your job description, it's the extra mile that separates the ordinary from the extraordinary.

17 Create loyalty and a great experience.

Our business is all about creating great experiences for each other and our clients. Go the extra mile, create those "wow" moments that clients and colleagues will tell others about. Create loyalty not by doing just what is expected, but by doing the unexpected.

18 Embrace change.

What got us here will not get us to the next level. Get outside your comfort zone and familiar ways of doing things and be willing to try something new and different. Change pushes each of us to grow personally and as a firm. Be excited by the opportunities change brings.

19 Deliver results.

While effort is appreciated, we reward results. Take ownership, follow-up on everything, and see things through to completion. Set high goals, measure and track your progress and professional growth, and hold yourself accountable not only for the results but the positive outcomes you create for clients and colleagues.

20 Be positive.

You have the power to choose your attitude. Choose to be joyful, optimistic, and enthusiastic. Pay attention to your tone in emails and in conversations. Avoid negativity. Your attitude is contagious. Spread kindness, optimism, and positive energy.

21 Honor commitments.

We work for each other — not just with each other. Do what you say you're going to do when you say you're going to do it. This includes being on time for all phone calls, appointments, meetings, and keeping promises. If a commitment can't be fulfilled, notify others early and agree on a new deliverable to be honored.

22 Pay attention to the details.

Missing just one detail can have an enormous impact on work. Be a fanatic about accuracy and precision. The goal is to get things right, not simply to get them done. Double-check your work. Get the details right the first time.

23 Walk in your clients' shoes.

Understand your (internal and external) clients' world. Seek to understand their business opportunities and challenges. See the world from their perspective. The better you understand them, the more effectively you can anticipate and meet their needs as a trusted business advisor.

24 Share information.

Communicate, communicate, communicate. Learn to ask yourself, "Who else needs to know this?" The more information sharing and transparency, the better we collaborate and effectively serve our clients and each other.

25 Embrace diversity.

Welcome people who may be different from you. Seek out what you can learn from them or how their unique perspective will make the work we do even better. Be inclusive. Make everyone feel that they belong. Diversity strengthens our firm.

26 Keep things fun.

While our passion for excellence is real, remember there are bigger challenges in the world than the work we do every day. Keep everything in perspective. Don't take things personally or take yourself too seriously. Make sure to laugh and enjoy every day.

mGO&you.