

Willamette Financial Advisors

Core Values

“Our Values create a sense of shared identity within Willamette Financial Advisors, LLC. They define what we stand for, how we do things, and what our Clients can expect from us.”

Core Value

Demonstrated by:

We lead by Example - At all levels we act in a way that exemplifies what we expect of each other and our affiliates.

Positive, courteous, and professional interactions and behavior.

We are Respectful in our Conduct with each Individual – We respect people for who they are and for their knowledge, skills and experience as individuals and team members.

Recognizing, acknowledging, and respecting each person’s role within the firm.

We Are Courteous, Open, Honest, and Timely In Our Communication – We share information, insight and advice frequently and constructively and manage tough situations with courage, candor, and professionalism.

Conflicts are addressed directly with the individual and not discussed with others behind the person’s back; confronting disagreements and conflicts in a timely manner; addressing conflicts by focusing on the problem and not attacking the individual; written communication is professional.

Straightforward And Open-Minded – We value diversity in people and ideas, as much as in personal style.

Listening to the individual without judgement or evaluation; seeking first to understand, then be understood; asks open-ended questions.

Integrity – We believe that nothing is more important than our reputation, and behaving with the highest levels of integrity is fundamental to who we are.

Adhering to the WFA policies and procedures, Code of Ethics and Standards of Conduct.

Commitment To Each Other – We believe that our culture of borderless collegiality is a competitive advantage for us, and we go to great lengths to nurture it and preserve it.

Actively seeking input from others within the organization; working through differences with courtesy and professionalism; actively acknowledging each person’s unique contribution and role.

We Are One Team – Our great colleagues make the difference. It’s when we share our skills, knowledge and experience we become one team. Diversity makes us strong.

Communicating openly; sharing ideas; helping one another succeed.

We Are Committed To Our Communities – We act as responsible corporate citizens by broadening our skills, experience and perspectives through work in our communities and protecting the environment.

Includes activities such as, Volunteering for Homes for Our Troops (a Wounded Warrior program); financial counseling for subjects of domestic abuse (Bradley Angel House); financial counseling of postdoctoral research fellows (OHSU).