

**WHAT IS A PARTNER?
BASIC ROLE AND EXPECTATIONS OF ALL PARTNERS**

1. A driver of firm growth, profitability and success.
2. Trustworthiness. This isn't about stealing money. Instead, it's about partners exercising good judgment, never circumventing policies and procedures, resisting the temptation to ignore questionable client practices. Being supportive of their decisions made by firm management.
3. Leadership. Partners earn credibility with fellow partners and the staff by being a good role model. Inspire others to follow your lead; set an example because the firm is evaluated by your conduct.
4. Manage client relationships and engagements effectively; attentive to their needs; establish strong client loyalty to maximize retention. Move clients upscale & grow their fees. Bill & collect promptly.
5. Train and mentor staff. Don't just be a "nice" partner, also be a partner that helps staff develop and advance under your tutelage. Treat them with *at least* as much respect as your clients.
6. Bring in business; contribute to marketing in *some* way; develop and cultivate referral sources.
7. Team player; develop a strong team beneath you; ensure that your largest clients have multiple "touch points" within the firm; share work among business units; refer work to other firm members. Commit to the one-firm concept – clients are the *firm's* clients. Put the firm first. Be willing to assist others.
8. Achieve your written goals. Fulfill your role in the firm.
9. Push work down to staff wherever possible; only do "partner-level" work. Recognize that a partner should work ON the business, not IN it. Keep the staff busy; never assume others are doing it.
10. Live and breathe the firm's core values, every day. Respect the firm, its decisions and its partners .
11. Protect the firm. Keep technical skills sharp; never do work that is beyond your capability. Never stop learning. Always practice strong ethics.
12. Be a good corporate citizen. Obey the firm's policies and procedures, even if you don't agree with them. Treat people respectfully. Respond in a timely manner to voice mails, emails, etc.
13. Practice good communications at all levels. Let people know what's going on with you.
14. Commit to the highest possible level of professional ethics.
15. Be accountable for your performance.
16. Be healthy personally.
17. Be fiscally responsible, 24/7; you are never "off duty."