DIGITAL STOREFRONT POLICY

OneTeam Financial, LLC Offers Digital Storefront Option as an Option to Continue Serving New Jersey Residents

As the state begins to open, OneTeam Financial will continue to offer virtual advising services for clients and community members not yet ready to visit an office

The health and safety of our clients, staff and community are always our top concern and priority. To continue providing critical engagement, education and information on the financial outlook during unusual times, or for those who wish to continue working in a virtual environment due to health and safety concerns, OneTeam Financial has established the following Digital Storefront Policy to best meet your needs while keeping you safe and comfortable in your own home.

Our Digital Storefront Policy works to ensure that you can continue having access to a qualified financial advisor to discuss, strategize and execute on important and timely financial decisions that need to be made, regardless of your location.

When needing financial advice, the following steps are adaptions to our standard policies and procedures so we can work with you in a safe virtual environment:

- All interactions can be done completely virtual. If you have a question or concern, you can contact the company through the website at www.oneteamfinancial.com/contact or by phone at (844) 451-TEAM.

- A digital meeting can be scheduled via phone, GoToMeeting, Zoom, FaceTime, Google Hangouts, or whichever platform is readily accessible to you. Our firm typically uses GoToMeeting and can provide guidance on how to use the video conferencing software prior to a meeting, if requested.

- Our document management platform maintains the highest level of security and allows for information to be exchanged between the advisor and client in a safe and secure format. Any confidential information, including account numbers, personal recommendations or otherwise privileged information, should be sent using this platform for your protection.

- Clients can use the firm's user-friendly digital platform for around-the-clock access to monitor their accounts and financial plans.

- Fund withdrawal and deposits can be initiated by contacting clientservices@oneteamfinancial.com.

- We are available to offer support to assist with questions on how to set up remote access or walk you through any account or technology questions as it relates to your interactions with OneTeam Financial.

- Ongoing communication on account status, current economic news and general financial advice will continue to be provided via one-on-one meetings, email and e-newsletters.

- We have developed webinars for clients to address broader financial questions many clients have had as it relates to these economically challenging times. Please feel free to tune into these webinars for the latest financial information.

- We will be following CDC guidelines for social distancing, enhanced cleaning measures and proper personal protection gear at the OneTeam Financial office locations. We look forward to enjoying a cup of coffee or meal with you, but only when you're ready. Until then, we'll be working hard on your behalf in whichever capacity is most comfortable to you.

"Our commitment at OneTeam Financial is to serve the community. Life is unpredictable, and during uncertain times, we want to do whatever we can to provide both our clients, employees and local residents with some financial peace of mind." said David Buckwald, CFP®, CLU®, ChFC®, CLTC®, NSSA®, CEO of OneTeam Financial, LLC. "By opening a digital storefront, we're able to continue to provide financial guidance to our local community in whichever format they prefer."

About OneTeam Financial, LLC
OneTeam Financial, LLC is a financial planning firm located in the tri-state area that provides proactive holistic retirement and income planning services for those at and near retirement. Through a collaborative, team-based approach, the firm works to provide advanced and diverse expertise to help clients maximize their wealth, minimize their taxes and expenses, create a lifetime income and protect families from avoidable financial pitfalls. For more information about OneTeam Financial LLC, visit www.OneTeamFinancial.com.