Gibson Capital, LLC
REGISTERED INVESTMENT ADVISER

The Path to Partnership

From time to time, employees may ask for information about the path to partnership at Gibson Capital.The following is a non-exhaustive list of the characteristics and contributions that our NextGen Partners have collaboratively identified to provide our staff with information about the attitudes, behaviors, and types of contributions that can lead to an invitation for partnership. Our intention is to share this information with our staff transparently and regularly.We understand that performance against these criteria is subjective, but we believe that our 360-degree performance review process will help to make consensus about an employee's performance on these dimensions visible.

While the descriptions that follow are intended to memorialize our expectations of partners, we understand that growing and changing will be a key to our future success. As such, we have every intention of revisiting and revising this information as our shared values and expectations evolve.

Prerequisites:

"Clients First" Prerequisite – The candidate embodies our philosophy that clients come ahead of the firm, the firm comes ahead of the individual, and professional commitments come ahead of financial rewards. They understand that this imperative is the foundation of everything that we do. Nothing supersedes it. Nothing replaces it. They embrace the notion that we exist to serve our clients, and this principle informs every decision and action that they take. ***These people have their priorities aligned with the firm's priorities.***

Character Prerequisite – The candidate always acts in the best interests of our clients and the firm. They respect and adhere to our regulatory policies and processes, demonstrate sound judgment, show thoughtful preparation, uphold the highest ethical standards, keep the promises they make, take ownership when they make mistakes, share credit when it's due, and are willingly accountable to their partners. ***These people act with integrity.***

Role Performance Prerequisite – The candidate can be counted on to reliably deliver above average performance in their functional role. ***These people crush their day jobs.***

Responsibility Prerequisite – The candidate eagerly takes on more and proactively looks for ways to improve things. They find ways to contribute to the work of the firm beyond their defined roles.They do the extra things that need to be done for our clients, our firm, and our staff. They are generous with their time and talents. ***These people work like owners before they are owners.***

Personal Development Prerequisite – The candidate is coachable and welcomes feedback. They are committed to lifelong learning to advance their skills and contributions. They enthusiastically participate in their performance reviews and leadership development processes like the Leadership Circle Profile to better understand their creative and reactive tendencies so that they can become a better teammate, partner, and leader. They recognize these activities as a necessary tool for evaluating and improving leadership performance in our next gen. They engage in processes that mitigate and resolve conflict among the group. ***These people increase the collective leadership potential of our group.***

Enterprise Value Prerequisite – The candidate adds to the overall enterprise value of our firm through their work. Their efforts grow and maintain our revenue, control and reduce our expenses, and manage and minimize the risks to the firm. We are looking for candidates whose contributions make the firm more valuable before they become a partner.
These people are our MVPs.

Dimensions of Contributions:

Strategic Contributions – The candidate takes charge of leading us into uncharted territories. They are deeply interested in and knowledgeable about the potential risks and opportunities that affect our profession, and they share their knowledge to help us formulate strategic plans for the future. They are willing to experiment and fail without losing stamina. They undertake the important work of nurturing future leaders so that our succession plan will succeed. ***These people drive the firm into the future.***

Management Contributions – The candidate meaningfully develops the people or processes that make the firm successful, profitable, and in compliance.These people help to develop the capabilities and career paths of staff members, collaborate on process improvements, and generally work on solving the day-to-day problems of the firm. They think deeply about our processes and policies and refine, improve, and redefine them as situations dictate. They turn ideas, suggestions, questions, and concerns into action.They continually evaluate our work through a comprehensive regulatory lens in order to keep our clients, the firm, and our staff safe. ***These people keep our work product and team moving forward.***

Client Service Contributions – The candidate delivers consistently excellent client service.They develop and maintain strong positive relationships with our current clients to retain revenue and generate referrals. They invest energy in building lasting connections with the next generation family members when appropriate based on our objectives to retain assets during transfers of wealth. They find creative ways to enhance the client experience, support our client-facing staff, or otherwise make the firm look good to our clients. ***These people foster happy clients.***

Intellectual Contributions –The candidate contributes to the thought leadership of the firm through their projects and work to help maintain our reputation as a "think tank for applied finance". They challenge and improve the firm's delivery of financial planning and investment advice through their research, writing, speaking, or the development or distribution of new information to clients, staff, centers of influence, or other professionals. Non-advisory candidates publicize and promote their expertise in the human resources, regulatory, or investment operations arenas to enhance the firm's reputation. ***These people keep us smart.***

Community Development Contributions – The candidate develops and expands the market presence of the firm through networking, prospecting, marketing, business development, and recruiting efforts.They elevate the profile of the firm and attract positive attention from potential clients, centers of influence, and employees. ***These people bring new clients and employees to the firm.***

Culture Contributions – An organization's corporate culture is the result of the shared values, ethics, attitudes, expectations, and behaviors of its people. In shorthand, culture is typically referred to as "how we do things around here". Culture encompasses the personality of a company and influences its atmosphere, workplace norms, performance expectations, and the overall employee experience.

At Gibson Capital today, we describe our corporate culture as one where excellence, hard work, continuous improvement, generosity, gratitude, respect, and joy exist harmoniously.

Candidates who contribute to the culture dimension embody these values and carry our standard of excellence. In the interest of reinforcing and affirming our culture, candidates who contribute on this dimension champion, promote, and actively participate in our rites, rituals, practices, traditions, standards, and stories. They embrace the things that we do to create a positive environment for our people, and they help to carry that load. They invest their energy in building deep, respectful, and productive relationships with our staff and within the partnership group. ***These people create an exceptional workplace where other people want to work.***