

Putting clients first.



A lot has happened regarding COVID-19 (Coronavirus) since our last communication. However, one thing remains the same - our hope and prayer that everyone is safe and healthy. We remain committed to providing you high quality service and ongoing availability during these uncertain times. We want to provide a brief update on business at AndCo and how it will impact our service to you.

Office:

Currently, our offices around the country remain open. However, all employees have the option to work from home based on personal preferences and/or unique family situations. Employees are coordinating work from home arrangements with their supervisors to ensure their job functions and client deliverables continue being handled timely and accurately. AndCo's technology and business continuity plan enable employees to work remotely without interruption in our services.

Client Meetings:

If a client wants to meet, we will be there to the fullest extent possible. However, please work with your lead consultant if you would rather convene outside of a standard Board meeting. AndCo is equipped with technologies to support a variety of alternative meeting arrangements so we can meet remotely, if desired, without disruption. Your service team, guided by the lead consultant, will work with you to determine what remote capabilities are most effective for your Board's situation. These difficult times unfortunately also lead to heightened market volatility and we want you to know we are monitoring the situation and are prepared to advise action where appropriate and/or necessary. Also, please know your service team is always available for phone calls, emails, or videoconferencing to answer questions and/or provide any information you need.

Professional Meetings:

AndCo continues to meet with investment managers and other industry professionals however, we are taking a prudent approach to keep everyone safe and healthy. For critical meetings, our team is planning to attend. For all other regular non-critical meetings, we are using discernment and encouraging all parties to proactively consider phone calls or videoconferencing as a viable alternative to minimize travel and contact during this time. Despite these challenges, we will maintain ongoing contact with the professional community so we can continue to advise clients on strategy and markets.

In summary, AndCo remains open and ready to serve. While we are taking the necessary precautions to be safe and healthy, we know we still have an important job serving our valued clients. We test our business continuity plan for events like this and I'm happy to report we are fully operational while taking thoughtful consideration of the health and safety of our valued employees and clients.

Be safe!