

# Dalton Wealth Management's Coronavirus Policy & Procedures

In order to ensure the safety of our clients and staff we are implementing the following, which has been highly recommended by our broker dealer LPL Financial and the U.S. Center for Disease Control and Prevention (CDC).

## **Scheduling:**

Please reschedule your appointment if you have a cough, cold, shortness of breath, flu or fever... or have been in contact with anyone who has these symptoms.

Also, please reschedule if you have been traveling recently or in contact with anyone who has, especially outside of the USA.

We will not be permitting any extra guests in the office during appointments at this time. (Such as very young children when a babysitter is not available.)

## **Office Lobby:**

Clients have the option to wait in the lobby area or in their automobiles if they prefer. Cindy or Aimee can call or text you when it is your exact appointment time.

Before each client appointment, the lobby will be thoroughly cleaned with disinfectants, including door handles, chairs and hard surfaces.

Upon entry to the office, all clients will be asked to clean their hands; sanitizer will be provided. If clients do not come with their own face covering, one will be provided to you to wear by Dalton Wealth Management. Staff will attempt to remain behind their desks to help ensure social distancing. Staff will be required to wear face coverings.

All magazines, complimentary pens, calendars, etc. have been removed to keep from spreading germs unnecessarily.

Beverages and snacks will not be offered at this time.

## **Appointments:**

We are discouraging handshaking, hugging or other types of physical contact between staff and clients at this time.

Before each client's appointment, the conference room will be thoroughly cleaned with disinfectants, including chairs and hard surfaces.

Before entering the conference room, Dave and Megan will wash their hands in the sink with soap and water.

Windows and doors to the conference room will remain open to allow for air circulation.

Everyone will have their own pen and pad of paper in the conference room. If you take a new pen to use, please take it home with you. If the client does not want the pen, then we will throw it away in front of them.

If clients do not feel comfortable taking home the physical paper reports we present during the meeting, we will be happy to email you a scanned copy after your appointment to print at home.

## **After Visit:**

No other clients will be permitted in the office while the currently scheduled client is having their appointment. Therefore, you will not run into anyone in the office on your way in or out of our lobby.

You will again be offered hand sanitizer on your way out of the office. We will open the door for you if you prefer.

After the client departs, we will sanitize and disinfect all surfaces the client or staff came in contact with, including, but not limited to: door handles, chairs, desks, tables, etc.

### **Dalton Wealth Management**

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