

Emergency Management Guide for Schulmerich & Associates, LLC

Section 1

Planning Team includes:

Stephen Schulmerich, CFP – Owner of said company (President)

Sharon Schulmerich – Vice President/ Human Relations/ Bookkeeper

Craig Schulmerich- finance/computer support/data maintenance

Heather Tolman – assistant to owner/ emergency manager/ safety and Health

External Team Members

Tualatin Valley fire an rescue

Portland Police

Local Hospitals

Mission Statement

Schulmerich and Associates will create value for our clients by helping them increase, manage and protect their wealth, and achieve their financial objectives within a risk tolerance level at which they are comfortable.

Vision Statement

Schulmerich & Associates will provide a leadership, support, commitment and other services necessary to help our clients achieve their financial goals and objectives in a changing global environment by:

- 1 Helping our clients clearly characterizes their financial objectives.
2. Helping our clients develop a success plan to achieve those objectives.
3. Helping our clients develop an investment policy statement to guide them in achieving their financial goals and objectives.
4. Building a relationship of trust and confidence.
5. Respecting our client's individual wishes and desires in accomplishing their financial objectives.

Safety and Health Program

Health insurance is offered to all employees.

Safety kit available on location

Evacuation Plan

Evacuation from the office will take place in the event of any major Emergency (Fire, Earthquake, Flood, Hurricane, Tornadoes.) In The event of a Terrorist attack a decision will be made by the Business owner as to where it will be safe to conduct business. In the event of a utility outage generators will be activated for business to resume. In the event of any of these disasters the phones will be diverted to cell phones and data/information will be accessed on laptop computers (Data is stored every business day

on USB backups. These backups are kept secure- one in a safety deposit box and another is kept with a data manager in an off location.

Fire Protection Plan

In the event of a large fire every one must vacate the building and meet across the street (in front of diggers RV driveway). 911 will be called by the first person that is able to vacate. Access to and from the building can be through 6 doors and any of the windows. Laptops and cell phones will be taken. Website based CRM stored in offsite in a safe and offsite location will be available to re start business. If the Fire is presumed small and controllable fire extinguishers are kept in various locations. One is kept in Craig's office, one is kept between Heather and Sharon's office, and one is kept in Stephens's office, and the last one is found in the kitchen. Who ever witnesses the fire should direct a second person to call 911 and proceed to attempt to put the fire out with the extinguisher.

Business Closing Policy

Business will be open Monday through Friday 8am-5pm. In the event of severe weather the office will be closed. Phones will still be answered but formal business will be conducted again on the next business day after weather resides. Business will only be closed when business owner decides business can not safely take place on that business day.

Section 2

Communications

All communication in the event of a disaster will take place on cell phones.

Property and Protection

In the event of a disaster desk drawers will be locked all USB's will be taken. All equipment will be shut down. All laptops, cell phones, and other portable devices will be taken to safe location.

Recovery and Restoration

Recovery of Evacuation location protocol: 3030 Grand Bay Blvd. #332 Longboat Key FL, 34228 second location 6809 W Piaffe Eagle, Idaho 83661. Business can take place at any of these locations without disruption.

Insurance

Insurance is held on all of the above described locations by business owner. Insurance is through State Farm Insurance Company. See insurance policy for more through explanation of coverage.

Employee Support

In the event of a disaster employees will continue to receive their salary. Work hours will be reduced and flexible. Cash advances will be available. Any crisis counseling will be available through our health insurance company.

Section 3

Fema

San Francisco, CA- (415) 923-7100

Bothell, WA- (206) 4874604 This is the one to use for Oregon.

State Emergency Management Agencies

Emergency Management Division Oregon

State Executive Dept.

595 Cottage St., NE

Salem, Oregon 97310

(503) 378-2911

