

Daniel & Nora Weiss



Daniel: Exemplify fairness, integrity, dedication and perseverance. Promote an entrepreneurial organization where success is celebrated and mistakes are tolerated. Commit to the financial soundness of the company. Commit to merit based employees upward mobility. Maintain organization focus and discipline while developing new territory. Empower and challenge employees to maximize their growth, feeling of self-worth and organizational effectiveness. Provide a level playing field for all. Provide fun team and skill building activities. Communicate a clear general strategy for the company to preserve alignment of values.

Nora: Continue to foster open communication to maintain the human aspect and depth in the company. Support the CEO emotionally, professionally and in family life so that he can continue to be a good leader.

november 2018

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Grainne Sen O'Malley



Provide guidance to the team as needed. Lead by example and support the infrastructure of the team.

Monitor the happiness level of the team and encourage open door communication. Keep up to date on topical issues, keeping the team informed. Work to support the internal clients and provide a strong HR department.

december 2018

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jamie steed



Maintain strict controls over internal finances. Be available to others both professional and personally. Treat everyone fairly and equally. Communicate with respect when dealing with mistakes. Maintain open communication and a positive attitude.

january 2019

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jonathan abratt



Display leadership and mentorship at all times. Show passion and drive in every task. Continue providing encouragement, trust, respect and an open door. Deliver high quality work to clients. Foster close relationships with staff, clients, vendors and regulators. Ensure internal happiness of staff. Chip in to ensure financial stability of the company wherever needed.

february 2019

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KC Gingras



Learn and develop tools to use once key components are learned, train others. Commit to projects and to team requests for help. Maintain confidentiality unless harmful to oneself or others.

march 2019

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Lily Sayers



Use my passion and courage to drive Chartwell's goals. Help clients feel like Chartwell is an extension of their team. Take care of myself so I can be strong and healthy to help others, providing support and guidance in times of struggle. Share my knowledge to help others grow.

april 2019

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Malessa Arias Bakineaux



Produce quality work that is the best reflection of myself and the company. Honor the integrity of the company. Contribute my knowledge, skill and experience to the team. Leverage my reputation and contacts to bring in new clients. Maintain a sense of commitment to myself and my colleagues to deliver on my word.

may 2019

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Melody Loudin



Volunteer to engage and learn as much as I can. Require the best of myself in every task. Offer creative ideas.

June 2019

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Omar Magana



Contribute to the company's goals and objectives by aligning our efforts more efficiently without compromising quality. Encourage both professional and personal growth and development. Maintain an environment of trust, reliability and commitment.

july 2019

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Petra Hrachova



Support the AML Team, match skills to the scope, share resources to ensure maximum effectiveness and productivity. Stay on top of the assigned engagements and control clients when they are crossing the line/scope of the engagement. Share observations, ideas, and maintain the right balance, be effective in managing tasks, continue to prioritize, support Chartwell's management and strategies.

august — 2019

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Richard Davis



Base decisions on experience aligning with the company goals. Own decisions and grow from previous experiences. Make meaningful and beneficial contributions in helping further others and myself in what is being achieved or sought.

september 2019

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sherry Tomac



Make Chartwell successful and profitable through open communication, problem solving and hands on support and personal encouragement.

October 2019

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Trish Jagodzinski



Produce quality products and services. Work with clients to achieve all their goals. Offer clients additional services beyond the scope of work. Maintain a secure environment and commitment to handle client documents with care. Keep ahead of the curve on compliance issues. Maintain a positive flexible attitude with continuous improvement for the benefit of Chartwell's clients.

november 2019

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Contact List

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Chartwell Holidays

New Year's Day	January 1, 2019	Labor Day	September 2, 2019
Memorial Day	May 27, 2019	Thanksgiving	November 28, 2019
Independence Day	July 4, 2019	Christmas	December 25, 2019

December 2019

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