

CLIENT SERVICES:

Personal Financial Statements

Dear Client:

Planning your financial future is one endeavor that requires an inordinate amount of time and effort. By selecting us as your provider of financial planning services you obtain:

- Independent and objective expertise and advice; we do not sell investments nor insurance and thus receive no commissions
- Financial advice tailored to individual circumstances
- Year-round availability including one-on-one planning sessions.

Some major financial events that prompt clients to seek our help in personal financial planning:

- Planning for children's college education
- Maximizing corporate benefit plan strategies
- Purchasing a Second Home
- Budgeting and Cash Flow Management
- Retirement Planning
- Estate Planning

Sincerely yours,

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