

We are honored to
work with some truly incredible clients.

Many of you have gone out of your way
to connect us with friends and family
members, and it means the world to us.

I hope you don't mind me asking,
but are there others in your life
that might benefit from working with us?

Maybe a friend who's nearing retirement.

Maybe a business owner.

We want to make sure this process
is as smooth and easy as possible.

So I'd like to share a quick tip
on best way to recommend us.

I often hear I recommended you to a friend
or my colleague

will probably give you a call.

But truth is, most people are busy,
and reaching out to a new advisor

can be intimidating.
Consider a joint email.

This can be a simple email to me
and your friends suggesting we connect.

That's it.

We handle it from there.

Rest assured that anyone you refer to us
will receive the same level

of professional service and personal
attention that you've come to expect.

Our goal is to help more people
achieve their financial goals.

And your introductions help us do
just that.

Thank you for the confidence

you've shown in our services
by choosing to recommend us to others.

We truly appreciate it.