May 27, 2021

Karen and Jason Mollett

416 Eiler Rd

Belleville, IL 62223

Dear Karen and Jason:

It was a pleasure speaking with you Thursday, May 27, 2021. Here is the information that we would ask you to bring in for your meeting Wednesday, June 2, 2021 at 5:00 p.m.

If you have any questions, please do not hesitate to contact me.

Our office is located at 12412 Powerscourt Drive, Suite 25, St. Louis MO 63131

ITEMS TO BRING TO THE MEETING:

\*Financial Planning Analysis Form \*Retirement Plan Documents

\*Annuity Statements \*Social Security Benefits Statements

\*Brokerage Statements \*Items you have questions about

\* Mutual Fund Statements \*Other Investment Account Statement

\*Pension Plan Documents

In order to make the best use of our time, we request that you bring as many of the above listed items as you can, as well as filling out the enclosed worksheet prior to the appointment.

The purpose of this meeting is for you to determine if you would be comfortable working with us. You may ask whatever questions you would like. We want you to feel confident in our abilities and competence.

Your meeting will last about an hour and there is no cost or obligation to you for coming in.

We look forward to having the opportunity to earn your trust and confidence!

Warm Regards,

Mark Kukielski

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