***We are delighted that you have chosen to visit with us!***

Appointment Day: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ Appointment Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Appointment Time: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Please arrive 15 minutes early

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Since this will be our first meeting, I know you will have questions about our approach to financial planning and will want to get to know us. I will be glad to respond to any questions you have and would also like a few minutes to review our planning philosophy with you, ask you questions about your goals, go over your information and get to know you. These insights can help us determine if we are comfortable working together.

At this meeting we will discuss ways to potentially help you:

**Structure your assets for retirement Become more tax efficient**

**Properly diversify your investments Determine needs for insurance coverage**

**Check your beneficiaries Ensure income sources will always be adequate**

Please fill out the enclosed questionnaire and bring a copy of the items listed on the next page. If you cannot get all the items listed on the next page together, please just do your best to accurately fill out the data form. To make the most of our time, we ask that you disclose what you are comfortable with so our planning team can give you the best appointment possible.

I look forward to meeting you and begin what I believe will be one of the most important steps in your successful retirement.

Sincerely,

Mark Kukielski

Financial Planner