



Working With

financial planners



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Hello! As you probably know, I strongly believe in the importance of wise financial planning for the future. I ran across this recently, and thought you might find these tips on selecting an advisor and making a financial plan to be helpful.

- Deal only with a licensed advisor
- Ask questions until you really understand
- Make sure your financial plan fits your needs and personality
- If you feel uncomfortable, it is OK to walk away
- Keep all of your paperwork in a safe place
- When you have a good plan put together, stick to it!

If you have a great financial planning relationship in place currently, congratulations! If not, I would be pleased to assist you in selecting an advisor who can help you realize your dreams. Please do not hesitate to contact me if I might be of any assistance to you at this time!

If you have any family or friends in need of mortgage information, please feel free to pass my name and number along - I would be honored to assist them!

Sincerely,

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