

From: Michael Whitman, MBA, CFP® michael@millenniumpg.com
Subject: Client Reviews are Here! Be sure to sign the DocuSigns!
Date: September 29, 2022 at 12:30 PM
To: [REDACTED]



[REDACTED],

October is finally here and we are getting ready to hold our client reviews. A lot of you have already scheduled your reviews and you will receive your agendas and pre-review homework assignments before the meeting. If you have yet to schedule your review for October/November, please [click here to do that now \(the schedule is starting to fill up\)](#).

I know that I have been sending out a lot of DocuSigns lately, let me shine some light on what those are. The first one that you all should have received is an official file release for Lincoln to release all records to me. The second most or you have received is either the new firm's Financial Planning Agreement or Investment Advisory Agreement. Be sure to review and sign those so that you are officially clients of the new firm. If you have any questions or did not receive the email, feel free to call, text or email me. Lincoln provided the old text number, I now have my own which is 984-214-8540.

Last but not least, please [complete your end of year checklist \(pre-meeting homework\)](#) so that we can add the necessary items to make the most out of your review meeting. If there is anything you all need at all, do not hesitate to reach out. We look forward to continuing to serve you now and in the future.

Sincerely,

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