

Hello [REDACTED],

We look forward to speaking with you on [REDACTED]. Attached is an agenda for our meeting.

Financial Planning

- Cash flow increase?
- Charitably inclined and want to reduce taxes?

Estate Planning

- Changes to your family, heirs, or have you bought/sold any assets this year?

Investment Planning

- Discuss current investment strategy compare to risk score.

Risk Management

- Health insurance deductible met?

Education Planning

- Contributions to a 529 account?

Tax planning

- Please upload your most recent paystub to the shared folder in your vault (or send to me via email) so that we can discuss tax saving opportunities (if any) for the remainder of 2022.

You will have received a calendar invite which will include a link for connecting via Zoom.

Let us know if you would like to add anything to our meeting.

For any questions, please reach out to us.

Regards,

Michael C. Whitman, MBA, CFP®

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P.S. If there is anyone that you care about, who you think could benefit from another pair of eyes, we would be glad to help them.