

**From:** mcollins@wincapfinancial.com  
**Sent:** Sunday, March 5, 2023 8:01 PM  
**To:** mcollins@wincapfinancial.com  
**Subject:** Smart Asset: Introduction of Mike Collins, CFA & John Fakename  
**Attachments:** CFA\_Facts.pdf; WinCap Financial Introduction.pptx

Hello John,

I hope this email finds you well. The folks at Smart Asset suggested I reach out to you, and I'm following on the attempted call today. I know your time is valuable so I'll be brief. My name is Michael Collins and I have been a fiduciary for over 15 years serving high net worth individuals, you can see my [LinkedIn profile here](#).

At [WinCap Financial](#) we give all potential clients 2 hours of complimentary advice, I want to prove my value to potential clients in advance. This includes a financial plan and a portfolio review. In the latter I can usually find ways to save you on investment costs and taxes whether or not you choose to work with me. I also affiliate with both Fidelity and Schwab, so working with me is a seamless transition for most. In addition to low cost ETF's and Mutual Fund we also have a specialty in individual stocks. If you are interested in a quick introduction you can [schedule time here](#) or reply to this email.

I also have my CFA Charter which holds me to the highest standards in the industry, more details attached. Additionally I moonlight as a college professor at Endicott College & Bunker Hill Community College, teaching young people about investments and planning.

Best,  
Mike Collins



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