

Aleia MacDonald

From: Aleia MacDonald <aleia@advanced-wealth.com>
Sent: Tuesday, March 21, 2023 1:32 PM
To: lou@loupolestaxadvisors.com
Cc: Aleia MacDonald
Subject: Referral Introduction

Hello Lou,

I had the pleasure of meeting with Mrs. MacDonald today and promised to send her your information. The family is looking for a sophisticated tax advisor, one who can assist them with reviewing stock options, Roth conversions, and tax preparation.

Should you both decide it makes sense to work together, please let me know so that we can obtain a signed Information Release form so that we may strategize together. I feel confident in this match and hope that you'll agree it is a good fit. I welcome continued communication should either of you wish to reach out to me as things progress.

Thank you for being a resource to the AWS family!

Aleia MacDonald
CERTIFIED FINANCIAL PLANNER™



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