



June 19, 2014

Dear Mr. and Mrs.

We would like to invite you into our offices to review your current financial situation. It's just sensible to measure your financial progress. If you are not making progress in accumulating assets, or if you are assuming too much risk as a result of your current portfolio or financial decisions, it's time for change.

Hopefully, you have a qualified financial advisor who you have an existing relationship with. If you don't, contact us today. Financial planning is not an event you do once in your lifetime. Financial planning should be a priority for you – it can help you manage your money, and allow you to plan for your goals and for the lifestyle you want for the future. Below is a voucher valid until August 15, 2014. This entitles you to a 1 hour consultation and a personalized financial inventory binder that we will organize for you.

Please call ( 443) 308-5200 to schedule your consultation today.

Sincerely,

Retirement Planning Services

## Personal Financial Inventory Voucher

*\*Must attend a 1 hour consultation at our offices to qualify.*

Expires August 15, 2014





**RetirementPlanning**  
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