LIFETIME WEALTH SOLUTIONS
Plan to Live Better.

Special Announcement

Your Planning Partner with Purpose

For many of us, the last couple of years has brought new and unique life challenges. Whether physical, relational, emotional or financial challenges, I believe, we all have a personal story to tell. In an effort to address some of these challenges, I wanted to share some exciting news specifically with you!

As you may already be aware, I entered into a planning partnership with Ann Gardner in 2020. Ann was one of my earliest mentors in financial services and has over 30 years' experience working directly with families and businesses to help them properly prepare for a better retirement.

As Ann and I have been working on new ways to improve the services and care we are able to provide, we have decided together to launch into the future under a revitalized new brand entity. We warmly welcome you, your family and friends in celebration of our brand new firm, **Lifetime Wealth Solutions**. We have never stopped working to provide our clients with the best advice, strategies, and solutions in support of their long term financial goals. When we partner together with clients, our focus is never on short-term quick fixes, but rather on long term plans and solutions to last a lifetime.

We are very excited to make this special announcement and experience this next chapter in the story of our agency along your side. As we move forward into an even brighter future, you can count on hearing from us regularly in support of your life, plans and overall well-being. Our promise is to deliver the best service and care as possible every step of the way. Be sure to engage in future communications coming from **Lifetime Wealth Solutions** and let us know how we can best serve you.

We encourage you visit our brand new website **www.LifetimeWealthSolutions.com** where you can learn more about our new company and easily connect with us. Don't forget to share with your friends and family. The greatest compliment we can receive in our business is being a trusted referral.

As life goes on, it ultimently brings change with it. Marriage, divorce, a passing of a loved one, newchildren or grandchildren, college tuition, or buying a home... all are events that can have significant impacts on your goals in the short and long term. It is important that we periodically check-in, review your plans, and assess if we need to make any needed adjustments due to such changes.

Feel free to give us a call at your convenience to schedule time to review your current situation. Our goal is to make sure you're on track for success and help you plan to live better.

Sincerely,

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