

Hi xxxxxx,

Beginning October 19th through November 19th we will be holding our Annual Strategy Meetings, where we will review our Six Pillars of Financial Planning (Cash Flow, Retirement Income, Investments, Taxes, Insurance and Estate Planning) and anything else to ensure we finish 2021 strong and set you up for financial success in 2022.

I will be holding these meetings either at our office, via Zoom or by phone.

Click [HERE](#) to be directed to my calendar and schedule a time that is convenient for you.

As we get closer to the meeting date my team will reach out to confirm agenda items, update outside asset balances, etc.

I look forward to meeting next month!

Andy