



**MOVING & STORAGE CO.**

4101 RIDER TRAIL NORTH • EARTH CITY, MISSOURI 63045 • (314) 291-7440 • FAX (314) 291-6127

March 31, 2010

Russ McMillan  
TRIAD | Wealth Systems  
11721 Powerscourt Drive, Suite 190  
Saint Louis, MO 63131

Russ,

The purpose of this (long overdue) letter is to thank you for your continued assistance in our family's financial strategies. By adopting your wealth maximization strategies Andrea and I have been able to "create" cash, while saving for our future.

Most recently (due to finances) I was on the verge of cancelling our disability insurance and lowering our premiums on both our term and whole life policies. However, with your creativity I was able to restructure our policies and fund them with the "cash" that our whole life policies have generated over the last several years.

As a longtime business owner I know the importance of testimonials and referrals; please feel free to share this with your potential clients.

Thank you again for continued support and assistance.

Best regards,

A handwritten signature in black ink, appearing to read "D. Kaufman", written over a light blue horizontal line.

David Kaufman