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Dear Russ,

Thank you so much for sharing with us how money works. I had no idea what this meant until you revealed how generations pass fortunes onto generations. You spent a lot of time with us and it was very enjoyable.

I have read the books you recommended, LEAP by Castiglione and The Defining Moment by Renier and thoroughly enjoyed them. Every young adult should have these two books for required reading! Are you sure you do not want to be a college professor when you grow up?

The experience we had creating our financial and estate planning was simple and seamless. As busy as I am, you made our meetings fun and enjoyable. We now feel there is someone who cares and watches over us. Anytime we had a question, you spent the time teaching us and explaining. Anytime you learned something new at a seminar, you shared what would be happening in the future. Fun! It is wonderful to see how our future is taking shape. Not even my parents advised me as well as you did.

Thank you again, Russ, for sharing your ideas and knowledge about how money works. It was lots of fun and most revealing!

Sincerely,

Doxey Sheldon, DMD

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