



I am pleased that you are considering our assistance in assessing your financial situation. The first step is to gather all the relevant information from which a preliminary analysis can be prepared. To that end, a profile is part of this attachment. Please print and complete. This process will involve the careful analysis of all financial data and the integration of this analysis with your individual objectives. Taxes, income, and risk are preliminary issues which are carefully evaluated based on specific criteria. Recommendations evolve as the analysis leads to a variety of options which will accomplish the established objectives.

I am confident that this comprehensive approach will allow you to make well-informed investment decisions. When completing the profile, if you are uncertain of something, more information is always better than none at all. Please return the profile and all other relevant information (including your most recent TAX RETURN and STATEMENTS AND RELATED DOCUMENTS) to our office at 92 Lancaster Ave., Second Floor, Devon, PA 19333. If you have any questions, please do not hesitate to call us at (877) 291-8176.

I will be in touch upon receipt of the information to review any questions that we may have. Thanks for allowing us the opportunity to earn your business in the most appropriate manner possible.

Sincerely,

Andrew J. Bilotta, Jr., CFP®  
Senior Vice President