



## WELCOME!

We are excited and honored to have you as a client. Please know that our team is always just a phone call or an email away.

### CREATE A PLAN FOR TODAY

Together, we'll build a plan that allows you to seize the day. Life is best when you are empowered to enjoy the moment.

### SAVE FOR TOMORROW

Designing future wealth is our passion. We'll collaborate with you to craft a plan that fits your unique goals so you can enjoy every moment.

### BUILD YOUR LEGACY

Our team specializes in thinking beyond today and tomorrow. We'll support you in building a lasting financial legacy for your loved ones.

## A LOOK INSIDE YOUR WELCOME KIT

We've attached a welcome kit which we hope will be helpful. You can also [view the web version by clicking here](#). Here's the information you'll find inside:

- Welcome Information & Services Overview
- Team Directory & Emergency Contact Information
- Longevity Planning Resources
- How To Access Your Raymond James Account Online
- Raymond James Account Setup Quick Reference Guide
- About Raymond James

- How To Create Your Social Security Account Online
- Forms ADV

Ready to learn more?

[DOWNLOAD YOUR WELCOME KIT](#)

Our team is delighted to have you on board, and we look forward to our next steps on this journey.

Sincerely,

**SKOTYNSKY FINANCIAL GROUP, LLC**



#### WHAT ARE THE NEXT STEPS?

We will be in touch with you soon to schedule a follow up meeting. Our mission is to build a powerful partnership with you in order to grow your wealth and create a longevity plan that allows you to live your life to the fullest. **To get started, click the link below and fill out the form, or simply reply to this message.**

Learn more at [SKOTYNSKY.COM](https://www.skotynsky.com)