Hi Susy, I hope all is well! Below is an email to you from Jack. As he mentions below, I will be sending you information on your eMoney account shortly. If you have any questions, please feel free to contact me. Kristen 818-888-4646 ext 105.

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Dear Susy,

I wanted to let you know that I really enjoyed meeting with you Wednesday the 24th at 3pm. As I mentioned at our meeting, I believe that I’ll be able to be of tremendous assistance in helping you to achieve what is most important to you, in particular your true purpose for money.

As we discussed, our next step is our Investment Plan Meeting, at which I’ll present my recommendations for moving ahead toward reaching your goals. I believe that you’ll enjoy this meeting and the rest of our process as it unfolds.

Please click [here](https://calendly.com/jack-16/2-hour-investment-plan-meeting)to schedule the Investment Plan Meeting. Plan on this meeting taking 60 - 90 minutes.

I have attached a link to a quick questionnaire for you to do before our next meeting below, as well as three disclosure documents for your reference:  

 1. Questions regarding your current portfolio and investments. This will help us understand your current approach in the management of your investments (2 min).

[Portfolio Questionnaire](https://www.surveymonkey.com/r/QPHVFCP)

2. Disclosure Forms:

- Description of Services & Standards

- ADV Part 2

- Privacy Policy

If you have any questions that I may answer before that time, please don’t hesitate to contact me.

Kristen will be sending you information on your eMoney account shortly.

Sincerely,

Jack Gelnak, JD

With Deep Gratitude,