



July 25, 2023

Dr. Alice M. Ape, D.D.S & Mr. Smithwick Ape
1812 Overture Road
Ditchwater, UT 84023



Dear Alice and Smithwick:

You know how dentists will send you a postcard when it's time for your annual tooth-cleaning and checkup? They do this to ensure your teeth and gums remain healthy, and to find and correct any issues before they become full-on problems.

Well, I have good news and bad news.

The bad news is that it's time for *your* annual "financial cleaning" and checkup.

The good news is that this will be a lot less uncomfortable than your annual visit to the dentist! And while I can't promise a free toothbrush at the end of it, I *can* promise something even better: The comfort that comes from knowing that all your finances are in order and that you remain on track to your long-term goals.

That's worth an hour in "the chair," right?

Please call my assistant Robert Hammer at 801-572-1480 to schedule your "cleaning." I can't wait to see those pearly whites of yours in my office very soon!

Sincerely,

A handwritten signature in black ink that reads "Susan A. Brokerman".

Susan A Brokerman, CFP®, PFS®
Sr. Investment Partner

A handwritten signature in black ink that reads "James Q. Sellers".

James Sellers, CFP®
Partner