

I look forward to our upcoming meeting to talk about your ideal retirement and your financial goals. I know your time is valuable, so to help facilitate the process we've enclosed a copy of our consumer guide that includes information about our firm and some things for you to consider prior to our appointment.

My goal for our one-hour meeting is to get to know one another, answer your questions and see if we can help. I will review your current situation, but I won't be selling anything at this appointment. In fact, I will offer up at least two ideas you can take home that could help clarify or help improve your personal financial planning strategies.

I have also sent a binder box to provide a single, secure location for all of your important documents. I encourage you to gather and store your documents in one safe place at home to give you quick and easy access. This also provides a simple, organized way to transport documents to meetings with your financial planner.

Here's to pursuing the retirement of your dreams.

Warm regards,

Reid Abedeen



SAFEGUARD INVESTMENT
ADVISORY GROUP, LLC
A REGISTERED INVESTMENT ADVISORY FIRM

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Appointment Information:

**Please call us at 951.667.4969 if you have any questions prior to our meeting.*