

Contact Preferences

Open and honest communication is a cornerstone of our practice and client relationships. How often and in what way you prefer to be contacted is up to you. Help us serve you better by completing and returning this sheet to us by mail, fax [860-531-9149] or email.

Name(s) _____

I/We Prefer to be contacted at the following:

Email: _____ Phone: _____

Financial Plan Updates

We normally contact you for plan updates once per year.

Please indicate your preference:

Annual Semi-Annual Other: _____

Portfolio Reviews

We normally contact you for reviews twice per year, unless additional adjustments are needed.

Please indicate your preference:

Annual Semi-Annual Other: _____

News and Information

Periodically we email our clients news about our firm, upcoming events, and general information on planning and investing. If you would rather not receive this information, please opt out here:

No, thanks [Opt Out]

Market Updates

Periodically we email our clients with news about the markets and/or the economy. If you would rather not receive this information, please opt out here:

No, thanks [Opt Out]

Event Invitations

We host many events throughout the year. Please indicate your event preferences [or opt out] here:

All Public Events [Social, Community/Charitable, Educational]

Specific Educational Events: Financial Planning Retirement College Planning

Other: _____

No, thanks [Opt Out]