



WEALTH
MANAGEMENT

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1. How important are socially responsible investments to you?

Very important.

Only if it doesn't hurt LT performance.

Not important.

2. How many meetings a year would you like to have?

1

2

3

4

3. How can we add the most value?

4. How much control do you want on investments?

None. I trust you and feel that a quarterly review is sufficient.

Some. I want to know what's going on, but I defer to you as my adviser.

All. I just want some advice and someone to bounce ideas off of.