

We consider the whole picture, business and personal, from a practical and prudent viewpoint. Talk to us about your personal finances or business. Call 503.390.7880 for an appointment, or email us at contactus@johnsonglaze.com.

3085 River Road N. | Salem, Oregon 97303 | 503.390.7880



An Affordable Financial Checkup for Your Future

Thank you for using Johnson, Glaze & Co., PC to assist with your tax planning and preparation.

Did you know we have also provided comprehensive financial planning services for many years, helping our clients reach their goals? If you would like to save for the purchase of a first home, or put together a plan that can make retirement an achievable goal, we can help.

The planning process can be intimidating, we know. It's easy to put off until "later" ... and "later" never arrives. As a result, the chance to take small steps to reach financial security slips away. We can be left vulnerable to unexpected events that can leave us—or our loved ones—wishing we could turn back the clock.

We're offering an affordable "financial checkup" to make that first step easier. This is a special offer to clients like you. We will assess your situation and present you with recommendations based on best practices in financial planning.

Name: _____

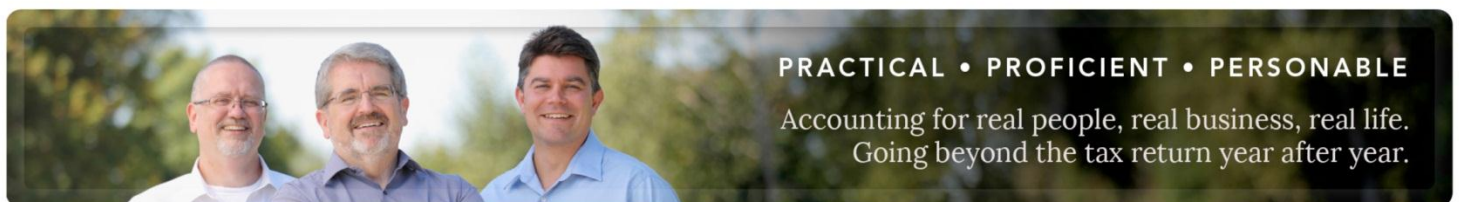
Best time/day of week for appointments: _____

Our report will address your specific goals in the following areas:

- ✓ Retirement income security
- ✓ Investment allocation
- ✓ Planning for death
- ✓ Unexpected changes in health or ability to work
- ✓ Providing for college education for kids or grandkids
- ✓ Risk management
- ✓ Debt management

We're offering this service for a very reasonable flat fee of \$275. Our goal is to make it easy and affordable to take that first step in planning for your financial future and for the next generation.

Please return this form to our office if you're interested in scheduling your financial checkup. We'll send you details on the process, and schedule a time to meet after tax season.



PRACTICAL • PROFICIENT • PERSONABLE

Accounting for real people, real business, real life.
Going beyond the tax return year after year.