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# Plan Delivery Acknowledgement

# DRAFT

This plan should be reviewed periodically to ensure that the decisions made continue to be appropriate, particularly if there are changes in family circumstances including, but not limited to an inheritance, birth of a child, death of a family member, or material changes in incomes or expenses.

We (John and Jane Smith) have reviewed and accept the information contained within this plan and understand the assumptions associated with it. We believe that all information provided by us is complete and accurate to the best of our knowledge. We recognize that performance is not guaranteed and that all future projections are included simply as a tool for decision making and do not represent a forecast of our financial future.

Your advisor (Brett Hixon) will review this plan with you on a periodic basis to determine whether your stated goals and assumptions in the plan are still relevant. It is not expected that the plan will change frequently. In particular, short-term changes in the financial markets should not generally require adjustments to the plan. It is your obligation to notify all interested parties of any material changes that would alter the objectives of this plan. If all interested parties are not notified of any material changes, then the current plan document should become invalid.

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Client signature & date

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Co-Client signature & date

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Advisor signature & date

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Delivery Date

## Notes

We have prepared this plan based on information provided by you. We have not attempted to verify the accuracy or completeness of this information. As the future cannot be forecast with certainty, actual results will vary from these projections. It is possible that these variations may be material. The degree of uncertainty normally increases with the length of the future period covered.

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Financial Advisor : Brett Hixon

# DRAFT

Plan Name : Financial Goal Plan

Report Name : Financial Goal Plan

11/25/2013