



Your Professional Advisors...

CPA (Certified Public Accountant)

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

HR Contact / Manager

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

Property & Casualty Agent

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

Mortgage Broker

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

Attorney (Estate Planning / Divorce / Personal Injury / Business Planning)

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

Name \_\_\_\_\_
Company Name \_\_\_\_\_
Phone Number \_\_\_\_\_
City \_\_\_\_\_
Email \_\_\_\_\_

Lorelle Farber, CRPC®
Financial Advisor

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