

August 5, 2019

Hello,

I know what you might be thinking:

“Why did I get this? Who is this person? What are they trying to sell me?”

I understand – I would be asking the same questions. Here is the deal:

1. You received this because I think you might learn something new that will improve your financial life.
2. I am a native San Diegan and award-winning retirement planner who has a passion for helping people.
3. I am not a salesperson. Some families choose to pay us for retirement planning advice, while others simply enjoy our free educational content. Both work for me.

I sincerely hope you enjoy learning about how you can reduce taxes through a little-known charitable giving tool.

Please do not hesitate to reach out if you have any questions. Or, if you just want to say “thanks”, that’s great too!

Best regards,

Taylor Schulte, CFP®

Founder & CEO

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