

Marcia,

This is a terrible idea, please reconsider what you are attempting to do. If there is the slightest breach of this program the consequences will be horrific. Getting a client to place trust in us is so difficult currently, with this in place it will only get worse.

Regards,

Bill

Bill Kurtz, MBA, CLTC
Investment Advisor Representative
Woodbury Financial Services, Inc.
71 Stevenson Street, Ste 449
San Francisco, CA 94105
415-655-6823 (O), 650-533-0401 (C)
866-411-1231 (Fax)
bkurtz@woodburyfinancial.net
www.woodbury-sanfrancisco.com