

May 27, 2022

Prof. Dante Alighieri
Westminster College
1840 South 1300 East
Salt Lake City, UT 84105



Dear Dante:

Happy Thanksgiving! I hope you have a wonderful day spent with family, friends, and great food.

As you know, Thanksgiving is a time for reflecting on all that we have to be thankful for. It occurred to us the other day that, as your financial advisors, we've never shared what *we're* thankful for. And we're thankful for a lot.

So, if we can beg your indulgence, please allow us to share:

Nine things I'm thankful for as your financial advisor

1. Our country

We're thankful we live in a country where we have the freedom to set our own goals, choose our own paths, and pursue our own happiness. There are millions of people in the world who *don't* have this freedom – a freedom I strive never to take for granted.

2. Our military

We're thankful for the thousands of brave men and women who strive to protect that freedom, along with all the other unalienable rights we enjoy.

3. Our community

As financial advisors, we've come to know many different members of our community, including people from all walks of life. While no community is perfect, I truly believe ours is as beautiful, unique, and worth participating in as any in the world. We're lucky to live here – and we're thankful we do!

4. Our modern world

While sometimes it seems like modern technology causes as many problems as it solves, in our case, it has enabled us to help *more* people *better* – and faster! The fact that we can speak with you over the phone, send you an email or monitor your investments with just the push of a button is amazing. There's more power in our cell phones than in the spacecraft that took Neil Armstrong to the moon – and that power is something we've come to rely on every day.

5. Our health

As financial advisors, one of the most important things we do is help people be secure *financially* so they can take care of themselves *physically*. It's helped us become more appreciative of our own health. The simple fact we can leave our homes and go to work every day is no small blessing.

6. Our job

We're thankful I have a job that enables me to support our families and pursue our passions. We're thankful our job *is* our passion. Not everyone enjoys going to work every day. Not everyone has the opportunity to do what they love. But we do, and we'll never stop being grateful for it.

7. Our team

While we all strive to be as self-reliant as possible, the fact is that *no one* succeeds in life without the help of others. That's why we're so thankful for my amazing team. There has never been a group of people more dedicated and professional. They not only make our lives easier; they push us to do better. To *be* better. We wouldn't be where we are without them.

8. Our families

The older we get, the more we realize that *family* is what matters most in this life. A loving, supportive family is the richest fortune anyone can have, and in that regard, we are rich indeed. In good times and bad, it's our families who have cheered us on, propped us up, and pushed us forward. We love and cherish them all.

9. Our clients

Dante, we're thankful for *you*. Do you have any idea how lucky we are to work with clients of your character? How humbled we are to be entrusted with your financial success? How honored we are to help you in any small way I can?

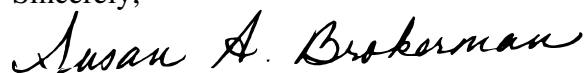
The truth is, there are lots of people in this world we would *not* want to work with. But when we look through our list of clients, we're staggered. We have the privilege of serving some of the smartest, kindest, most *decent* human beings anyone has ever met.

People like you are why we do what I do. You're the reason we never hit the snooze button. The reason we're happy to burn the midnight oil. There aren't words to express how thankful we are for your business. For your trust. For your kindness. For *you*.

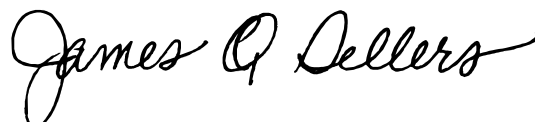
In other words, Dante, we're thankful to be your financial advisor.

On behalf of our entire team, we wish you a Happy Thanksgiving!

Sincerely,



Susan A. Brokerman, ChFC
Vice Chair of the Board, Branch Manager



James Q. Sellers, CFP
Executive Vice President, Branch Manager