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Dear

You have previously expressed interest in learning more about personal Estate Planning. Keeping important family documents organized and up to date is not always at the top of our long “to do” lists, but doing so can help save your loved ones time and stress following your unfortunate death or disability. It will help ensure that your assets are allocated according to your wishes.

Gathering all of your official documents and making sure your loved ones know where they are is an important first step. In order to make this task a little easier for you, we have enclosed our Raymond James Ltd. Estate Planning Reference Guide. This handy reference guide gives you one central location for all of your vital information.

Although the booklet is straight forward, it may take some time to complete and where necessary it will make you aware of items which still need tended to.

Start working with it right away, you will find personal satisfaction with the results!

Sincerely,

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