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Herman “Tommy” Thompson
Innovative Financial Group
3520 Old Milton Parkway
Alpharetta, GA 30005

December 6, 2021

Dear Tommy,

For years, my husband and I had contributed regularly to our ROTH IRAs because we knew that was the right thing to do to prepare for our eventual retirements. But we knew very little about what our retirement would look like, and how much we would need to save. And to make matters worse, we didn't have a good relationship with our financial advisor. We had been with him for years, mainly because he was a client, and also because it was a huge hassle to find someone else. Most meetings with him ended in our being even more confused than when we started.

After about 2.5 years of getting to know you, and hearing your infominutes and 7 minute presentations, I knew that you would be a good fit for us. So I started with opening two 529 accounts for my grandchildren. What an easy process! You knew exactly what I needed, and all I had to do was give you some information and sign a few papers. A few months later, Pat and I met with you to discuss our investment needs. Of course, you impressed Pat, so we moved our accounts over to you, and the rest is history. And the best part ... we didn't even have to contact our previous advisor – you took care of everything!

Even though you have probably forgotten more than I will ever know about investing, you still know how to explain a complicated idea in a way that is easy to understand. And I'm sure that you've answered the same questions more than once in our multiple meetings. Pat and I are thrilled to have “a guy” who we can talk to whenever we have questions and need advice. You are the best, even if you have a bad habit of wearing red and black. I guess no one is perfect.

Sincerely,

Eleanor L. Thompson

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