

LETTER OF APPRECIATION

In Recognition of

DANNY NUNGESSER

In 2019, my retirement account from my previous employer had been sitting idle for some time after I had left their employ. I had no idea what I should do with it and wasn't even sure where to begin.

When I reached out to Danny, he quickly found time for a free consultation at my home. He asked me about my goals, educated me about various available options, and discussed potential risks and downsides with these options as well. I've never had anyone care to discuss these things with me the way Danny did. I felt remarkably confident that I was in the right hands.

That confidence was quickly proven to be well-founded. Danny took care of EVERYTHING, every step of the way. He transferred my accounts and adjusted the structure and allocations of my funds according to our agreed upon strategy. Just months later, I had already experienced substantial growth of my account value! My accounts have been better than ever, ever since!

I've never felt more aware and in-control of my retirement situation as I do now that I have Danny helping me. He even proactively calls to inform & advise me about market conditions, and potential strategies to continue maximizing my money's potential, and pursuing my retirement goals; something I personally need and appreciate!

Danny now manages my wife's retirement account as well. I absolutely recommend him to anyone like me who needs a knowledgeable financial advocate to help them grow their wealth and reach their retirement goals.

Robert J. Grimes