



July 9, 2019

Tommy Thompson, CFP  
Innovative Financial Group  
3520 Old Milton Pkwy  
Alpharetta, GA 30005

Dear Mr. Thompson,

I wanted to write this letter to serve as an endorsement from me for you to use with your clients.

My current financial planner had gotten non responsive after working with me for 12 years. They were not returning phone calls, and only called me to sell me expensive products that netted them great commissions, but really did not fit my financial game plan. Since I am self employed, my investments are self directed, so I was needing sound financial advice. When you and I met, I was looking for a way to utilize my retirement account to invest in a business without paying penalties for early withdrawal. You were able to take my retirement account and arrange so that I could borrow against the account without penalty. I was able to get access to the funds without penalty. Also, By taking a loan from my retirement account, I was able to make interest payments to myself instead of some other institution.

Since that time, I have referred many friends, clients and business associates to Tommy to get expert financial advice for Retirement including: Social Security income advice, retirement planning, long term care, Annuities, and Asset management.. Tommy and the team at Innovative Financial Group stay on top of trends and products as well as review their clients holdings regularly to assure that their client's investments are being maximized.

Sincerely,

Dan McKenzie  
Managing Partner, Options Mortgage Services, LLC

The Dan McKenzie Mortgage Team(Personal NMLS #150787)  
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