THE VANDERBLOEMEN HIETPAS & FOY GROUP
Certified Public Accountants and Business Advisors

THE VANDERBLOEMEN GROUP LLC
Certified Public Accountants

THE VANDERBLOEMEN / MACDONALD GROUP
Certified Public Accountants and Business Advisors

THE VANDERBLOEMEN GROUP | WEALTH & PARTNERS
Certified Public Accountants and Business Advisors | Financial Services

Dear Client,

For over thirty years, The VanderBloemen Group of companies, including its' founding partners Stephen VanderBloemen, Gib Hietpas, Thomas MacDonald and Tom Schmitt, have strived to provide the in-depth expertise and advice of a large firm with the personal service and attention of a small firm, in order to serve your business and personal accounting needs.

Over the years many of our clients have asked questions like: How much should I be contributing to my SEP or 401(k)? What amount of life insurance should we purchase for our company's key executives and employees? What is the best life policy for me personally – permanent or term? What kind of retirement benefits should our company be providing? What are my disability insurance options? Have I saved enough for retirement? When should I begin succession planning for my business?

We have helped answer these questions and have done our best to educate and provide guidance related to each of these issues. We have provided assistance from our perspective as Certified Public Accountants and business advisors. Often, our counsel and services were shared as one portion of a plan, leaving the client responsible for coordinating all of the other parts. Outside insurance and investment advisors were counted on to provide assistance with various issues and to answer questions pertaining to their specific area of expertise. Unfortunately, in our opinion, and more importantly, in our client's opinion, those advisors either failed to provide the needed services or failed in implementing the comprehensive plan that had been devised.

These situations are exactly why we partnered with Wealth Partners Financial Services in January of 2018. We have now expanded our capabilities to help provide more thorough guidance on more financial matters so that you can make educated decisions on the financial future of your business, as well as yourself. Whether you need to review your corporate benefit programs,

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maximize capital accounts, review what types of insurance you need, or handle other specific needs, Wealth Partners provides access to the best unbiased options available along with expert fiduciaries to lead you through the decision-making process. We know that achieving financial success requires more than just a single answer to a single question. To really help grow and protect your company, you likely require help with questions that arise on a daily basis. With Wealth Partners, you will receive expertise from accomplished professionals, full attention to even the smallest of matters, and services that are built around you and your business including:

- **Business Planning** to help protect and then grow everything you have built
- **Budgeting / Cash Flow Management** to help achieve short and long-term financial goals
- **Retirement Planning** with options that are unique to you and your staff
- **Investment Planning** to help you save and gain the most from your portfolio
- **Risk Planning** to protect your future from the unexpected with myriad insurance offerings
- **Tax Planning** using investment strategies developed alongside your trusted CPA
- **Legal Planning** to ensure your financial plans and affairs are not unraveled should something unexpected happen

Wealth Partners, as experts in planning, investments and insurance, will augment and reinforce the services, guidance and counsel already provided by The VanderBloemen Group. As one complete organization with a more comprehensive and knowledgeable team, we strongly believe we will better provide you the tax and financial advice and services you need, want and expect.

We are excited to introduce you to the Wealth Partners team and look forward to offering you new ways to feel confident in making solid financial decisions for your personal and business finances. We will continue to serve you with the utmost care and look forward to our future together.

Please find our enclosed year-end tax letter. If you have questions regarding our partnership with Wealth Partners or questions about our suggested tax and financial strategies, please give our team a call at (262) 574-0374.

Sincerely,

The VanderBloemen Group