



Stephen Brent Wells
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Scott J. Silbert
President
Creative Planning Strategies
Two Park Avenue, Suite 300
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Dear Scott,

Over the many years we have known each other, it has been my pleasure to work with you. You always have interesting and provocative thoughts and you deliver the unvarnished truth.

As a trusts and estates attorney and founder of The Solaris Group, LLC, a global private wealth management and investment firm, I have met many people in your industry. Unlike most of them, you have consistently come up with really interesting strategies. And, while your ideas are cutting edge, they are also conservatively conceived and minimize the possibility of putting your clients in jeopardy.

It has been my pleasure to refer you to various practitioners I know - very sophisticated trust and estate planning lawyers and accountants. Their response has been uniformly positive.

When I refer you, I always tell people that, whether or not they adopt your approach, they will be better off for having heard you out. I believe that your 3D Wealth™ concept is a well-conceived, creative financial strategy. Your unique, three-dimensional view of money and wealth is one of your most refreshing ideas.

I look forward to working with you for many years to come.

Most sincerely,

TESTIMONIAL RELEASE FORM

Authorization and Release of Information


I authorize Scott Silbert and Creative Planning Strategies (collectively "CPS") to use my testimonial (the "Testimonial") and/or excerpts thereof, as well as my name, title and brief biographical information in connection with publicizing and promoting CPS.

As described and affixed to the back of this release form, the Testimonial may be used in printed publications, multimedia presentations, on websites or in any other distribution media. I agree that I will make no monetary or other claim against CPS for the use of the Testimonial, and acknowledge that I have received no payment or any other consideration for providing it.

I hereby release Scott Silbert and CPS from any causes of action which may arise from CPS's use of the Testimonial.

I hereby affirm that I am over twenty-one (21) years of age and competent to contract in my own name.

Name: STEPHEN BRENT WELLS

Signature: 

Dated: January 14, 2019