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Mr. Scott J. Silbert
President
Creative Planning Strategies
Two Park Avenue – 3rd Floor
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Dear Scott,

Thank you for the tremendous positive impact you have had on my family's financial well-being. Having purchased life insurance previously, I thought I knew what to expect, but when I started working with you, I saw an entirely new strategic dimension to it. As we continued going through your 3D Wealth™ process, I absolutely fell in love with it.

Subsequently, I have found that the strategies we implemented have been very helpful to me right now. As a back surgeon for more than 25 years, I see evidence on a daily basis that we never know what is going to happen. The past few years have certainly underscored this for my family. First, as you know, one of my children suffered a serious illness. Had we not followed your recommendation and included life insurance on her and her sister as part of our comprehensive financial strategy, she would currently be uninsurable. Second, the Covid pandemic really dealt a blow to my practice and because we followed your recommendations and properly funded our policies, we were able to access their cash value for just this type of emergency – and we no longer had to worry about paying premium during the pandemic.

Beyond the amazing work you've done with my family's financial strategies, you have been extremely helpful in serving as our agent for various policies we had purchased prior to meeting you. I am very grateful to you for taking on that role especially when you help me navigate the unruly process of collecting on my wife's life insurance in the middle of Covid. Being able to rely upon you as I have over these many years provides me and my family with considerable peace of mind.

I was so pleased to hear that my colleague, Dr. Wright, came to see you at my recommendation and had the exact same positive experience as me. Thank you again, and everybody should be so lucky to have someone as creative, knowledgeable and committed to their clients like you are. I am so glad that Ed recommended you.

With warm regards,

Paul M. Brisson, MD

A handwritten signature in black ink, appearing to be 'P. Brisson' with a flourish at the end.